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ABSTRACT

In order to determine job demand in the cosmetology industry, a survey was made of a nationally representative stratified random sample of 1,454 beauty salons, barber shops, and unisex salons in July 1991. Salon owners were asked about 1990 and their plans for the future. Survey results were supplemented with information about the industry provided by 15 large chains, employing between 58 and 34,000 hair care professionals each (a total of 70,000 professionals represented). Information was also garnered from the "Milady Cosmetology State Board Guides." Key findings include the following: (1) during 1990 there were more than five job openings for every newly licensed person, and more than 131,000 openings were for entry-level positions; (2) 1,265,000 professionals were employed by salons in December 1990 and 65 percent were full time; (3) the number of salons has been increasing approximately 2 percent per year for the past 5 years; (4) there are 1.8 job openings per salon nationwide; (5) the highest proportion of job openings is in the Northeast and West, the lowest in the North Central and Southern states; (6) the South provides the most job opportunities for new licensees; and (7) approximately 40,000 entry-level positions went unfilled in 1990. (An appendix contains 16 tables of data from the survey. There are 10 references.) (KC)

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Job Demand in the Cosmetology Industry

A National Survey Conducted for

The National Accrediting Commission
for Cosmetology Arts and Sciences

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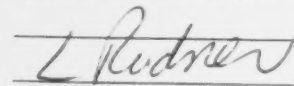
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August 1991

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Key findings

In December 1990, approximately 84,000 of the 95,000 newly licensed cosmetologists were working in one of the nation's 298,000 Beauty Salons, Barber Shops or Unisex Salons. Virtually every newly licensed individual was able to obtain work in the Northeast, North Central and Southern states.

Newly licensed individuals did not have difficulty finding employment. During 1990, there were over 5 job openings during the year for every newly licensed individual. Over 131,000 were for entry-level positions.

Other key findings are:

- 1,265,000 professionals were employed by salons in December 1990; 65% were full time.
- Salons typically have four or five chairs and employ four experienced workers. On average there is an inexperienced worker in one out of four salons. Two out of every five working cosmetologists have been at the same salon for 3 or more years.
- 85% of the salons have been in business three years or more. The number of salons has been increasing approximately 2% per year for the past five years.
- Nationwide there are 1.8 job openings per salon. The highest proportion of openings are in the Northeast and West and the least in the North Central and Southern states. For new licensees, the South provides the most job opportunities; the West provides the least.
- To find new employees, salons most frequently use referrals by employees, referrals by schools and word of mouth. State employment service agencies and trade journals are rarely used.
- Nearly half of the salons reported that they had difficulty finding new employees. Approximately 40,000 entry-level positions went unfilled.

Job Demand in the Cosmetology Industry

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Introduction

The U.S. Department of Labor has cited the cosmetology field as a growth industry with bright employment prospects. Others have accused cosmetology schools of training people for jobs that do not exist. To resolve these apparently bi-polar viewpoints, the National Accrediting Commission for Cosmetology Arts and Sciences (NACCAS) commissioned this national study of beauty salons to obtain accurate, definitive information concerning the salon industry.

We found that the cosmetology industry is enormous, employing 1,264,000 individuals in 298,000 small salons and Barber Shops. Most salons have a core of professionals that have been there 10 years or more. Yet, there is significant employee turnover -- the typical salon had 5 employees coming and going during 1990. New licensees apparently had little trouble in finding jobs. Almost 90% of the new licensees were employed in the industry in December 1990. With the number of salons increasing 2% per year for the past 5 years and the number of new licensees decreasing by 4.3% per year, this is a growth industry affording entry-level job opportunities.

In preparing this report, we relied on three sources of data -- 1) the *Milady Cosmetology State Board Guides*, 2) the results of our national survey of Beauty Salons, Barber Shops and Unisex Salons, and 3) the results of our small survey of large chain owners.

The bulk of this report presents an analysis of the results of a survey completed by a nationally representative stratified random sample of 1,454 Beauty Salons, Barber Shops, and Unisex Salons. In July 1991, we asked salon owners questions about 1990 and their plans

for the future¹. We supplemented the results of the individual salon survey with information about the industry provided by 15 large chains, employing between 58 and 34,000 hair care professionals. Our large-chain respondents employed 70,000 professionals -- 5.5% of the industry.

The body of this report summarizes our key findings. After this introduction, we describe the salon industry, presenting information such as the number and types of salon, number of chairs per salon, and age of establishment. In our third chapter, we describe salon employment during 1990. Here we present the number of experienced and inexperienced workers, types of positions, and the number of years employees stay at the same salon.

In the fourth chapter, we describe the job opportunities in the salon industry. We note the number of openings and hires during 1990, the methods salons use to find new employees, whether they were able to find qualified applicants, and their plans for future hiring. The fifth chapter contains regional summaries. Similarities and significant differences in the salon industry across regions are noted.

We describe our methodology and compare our figures with estimates made by the Bureau of Labor Statistics in our sixth chapter. The Appendix contains 16 tables which capture the results of the study. Referenced in the body of this report with an A prefix (e.g. Table A-1), the Appendix tables provide more detailed information concerning the facts findings in text.

In reading this report, you should recognize that the results are based on a sample and that the reported values are only estimates. With our sample of 1,454 salons, the 95%

¹ Notably absent from our survey are Nail Care establishments. Many cosmetology students specialize in manicure and go to work directly in that industry. We omitted the industry due to the expense and difficulty in obtaining an adequate definition of the universe of nail care establishments. Their omission again makes our results conservative.

confidence intervals for the reported proportions of salons nationally is $\pm .026$ or less. That is, if we were to repeat the study, we would expect slightly different numbers each time due to sampling. We would expect the proportions to fall within 2.6% of the values presented in this report in 95 out of 100 replications. In addition to national data, we report regional data. The margins of error for these regions are larger due to the smaller regional sample sizes. With 283, 373, 465, and 333 respondents, the 95% confidence intervals for the Northeast, South, North Central, and Western state data are 5.8%, 5.1%, 4.5%, and 5.4% or less, respectively. Confidence intervals are indicated in text as a range in parentheses, e.g. ($\pm .19$).

The Advisory Council on Cosmetology Relations in Education (ACCRED) served as the advisory board for this project. The authors are indebted to Mark Gross, Elise Scanlon, Parker Washburn, Art DeConcilis, Richard Millard, Carol Cataldo, Robert Mugnai, Jerald Hendrickson, Lynn Burkett, Ernest Halpern, James Rogers, Jan Rowland, Charles Oman, John Jay Grisasse, and William Susetka, of ACCRED and NACCAS, for their invaluable assistance in conducting this study. Their industry expertise allowed us to design a report and prepare a questionnaire that was responsive to industry needs and sensitive to the viewpoints of Salon owners.

Chapter 2

The Salon Industry in 1990

Regions

In order to legally cut hair or operate a salon, one must obtain a license from the appropriate state board. In 1990, there were approximately 298,000 licensed salons in the continental United States and the District of Columbia. This averages to be 20 salons for every school district and 13 salons for every Savings and Loan Bank and branch office. The number of salons ranges from a low of 450 in the District of Columbia to a high of 24,463 in California².

Approximately 96,000 students sat for and passed their state licensing examinations. The number of new licensees per salon ranged from a low of one new licensee to every ten salons in Maine, New Hampshire, Kentucky, and Maryland to a high of more than one new licensee for every two salons in the District of Columbia, Louisiana, Arizona, California, Colorado, New Mexico, Nevada, and Utah.

We divided the nation into four different regions. The Northeast included 10 states from Maine to Pennsylvania. The South included 15 states from Maryland to Texas and the District of Columbia. The North Central region included 12 states from Ohio to Kansas. The West included 11 states from Washington to New Mexico (see Table 1).

Of the four regions, the South contains the greatest number of salons and new licensees. The West contains the lowest number of salons and the highest number of new licensees per salon (see Figure 1). That is, the West appears to be producing a

² The data in this report are weighted to reflect the number of salons in each state.

disproportionately high number of new licensees. Later, we will show that this may be creating a regional supply and demand problem.

Table 1
Number of Salons, Number of New Licensees, and
New licensee/Salon Ratio by State and Region

Northeast

	<u>Salons</u>	<u>Licensees</u>	<u>Ratio</u>
Connecticut	2,425	960	.40
Delaware	765	285	.37
Massachusetts	8,000	3,200	.40
Maine	2,409	275	.11
New Hampshire	1,800	205	.11
New Jersey	7,491	2,356	.31
New York	17,434	5,160	.30
Pennsylvania	16,856	5,020	.30
Rhode Island	1,100	430	.39
Vermont	725	85	.12
Region	59,005	18,044	.30

South

	<u>Salons</u>	<u>Licensees</u>	<u>Ratio</u>
Alabama	5,800	840	.14
Arkansas	4,477	761	.17
Dist of Col	450	275	.61
Florida	13,004	3,570	.27
Georgia	9,525	1,580	.17
Kentucky	4,950	542	.11
Louisiana	8,840	5,350	.61
Maryland	3,700	350	.09
Mississippi	5,056	725	.14
North Carolina	10,500	1,538	.15
Oklahoma	5,550	1,849	.33
South Carolina	5,004	1,433	.29
Tennessee	6,967	2,050	.29
Texas	20,100	8,982	.45
Virginia	5,299	2,120	.40
West Virginia	2,775	518	.19
Region	111,997	32,483	.29

North Central

	<u>Salons</u>	<u>Licensees</u>	<u>Ratio</u>
Iowa	4,910	895	.18
Illinois	15,320	3,560	.23
Indiana	9,000	3,120	.35
Kansas	3,983	885	.22
Michigan	5,001	3,000	.33
Minnesota	8,800	1,790	.20
Missouri	9,535	1,400	.15
North Dakota	745	193	.26
Nebraska	2,430	463	.19
Ohio	11,039	4,839	.44
South Dakota	1,354	174	.13
Wisconsin	4,025	1,070	.27
Region	80,142	21,389	.27

West

	<u>Salons</u>	<u>Licensees</u>	<u>Ratio</u>
Arizona	2,829	1,576	.56
California	24,463	14,758	.60
Colorado	3,847	1,985	.52
Idaho	1,727	324	.19
Montana	995	183	.18
New Mexico	1,369	714	.52
Nevada	1,100	678	.62
Oregon	4,700	1,054	.22
Utah	1,630	810	.50
Washington	3,775	1,565	.41
Wyoming	585	171	.29
Region	47,020	23,731	.51

Nation

298,164	95,666	.32
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New Licensee/Salon Ratio
by Region, 1990

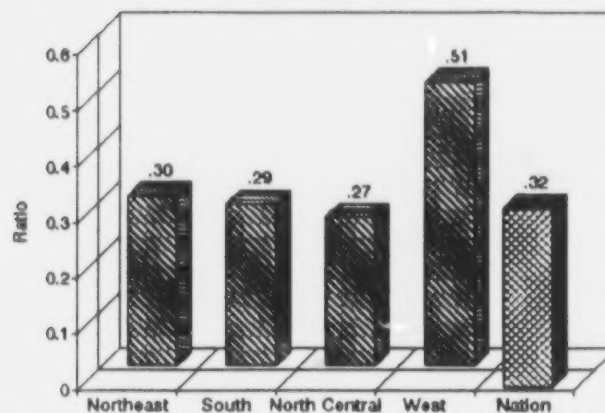


Figure 1

Salon Type

The 298,000 establishments were broadly defined as falling into one of three categories: Beauty Salons, Barber Shops, and Unisex Salons³. The South had the highest concentration of Beauty Salons - about 70 percent of the establishments in the South were Beauty Salons, while only 9 percent were Barber Shops.

Barber Shops were also a smaller proportion of the total number of establishments in the Industry as a whole. Only one tenth of all establishments were Barber Shops, compared with two thirds that were Beauty Salons. There were twice as many Unisex Salons as Barber Shops (see Tables 2 and A-1).

The low number of Barber Shops supports the theory that the traditional Barber Shop is fading from the scene with the rising popularity of the Unisex Salon and its broader

³ Respondents indicating that they held both beauty salon and barber shop licenses were classified as unisex salons.

offering of services. This can be seen most dramatically in the Western states where, of 47,000 establishments, 28,000 are Beauty Salons, 14,000 are Unisex Salons, and only 5,000 are Barber Shops (see Tables 2 and A-1). It should be noted that cosmetology schools typically train individuals for cutting both men's and women's hair.

Table 2
Distribution of Establishments by Region

	Total	N.East	South	N.Ctr1	West
Beauty Salons	64.9%	58.5	70.5	64.1	61.3
Barber Shops	10.2	11.9	9.2	11.2	8.8
Unisex Salons	24.9	29.7	20.3	24.7	29.9
	100.0%	100.0%	100.0%	100.0%	100.0%

Location

We asked salon owners to describe their location⁴. Relatively few of the establishments stated that they were located in central city areas, while the rural areas had the greater share (see Tables 3 and A-1).

Table 3
Rural-Urban Location by Region

	Nation	Northeast	South	W. Central	West
Rural	43%	43%	34%	49%	45%
Small City	28%	32%	27%	27%	29%
Suburban	20%	20%	29%	16%	17%
Central City	9%	6%	10%	8%	9%
Total	100%	100%	100%	100%	100%

⁴ Omits were coded by LMP Associates based on zip code and county information from the 1980 Census.

Company Age

The vast majority of beauty establishments are eleven or more years old and a large number are between 3 and 10 years old. These numbers imply that job seekers are typically seeking employment from well established firms (see Figure 2 and Table A-2).

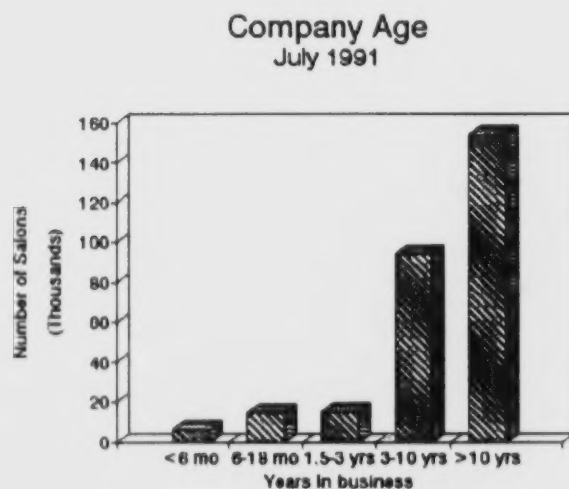


Figure 2

Only 2.2 percent of the salons in our sample were less than 6 months old -- a figure that is consistent with the trends noted in the *Milady Cosmetology State Board Guides*. According to the *Guides*, there were approximately 277,707 salons in the entire United States in 1985 and 291,677, 295,499, and 300,911 in 1986, 1987 and 1989 respectively -- yielding a consistent average growth rate of 2.0% per year. We found little, if any, growth in Barber Shops, and a growth of 2.8% and 2.3% among Unisex Salons and Beauty Salons, respectively.

Salon Size

The average number of chairs per salon is 4.84 ($\pm .21$), with the Northeast and West having slightly larger salons and the North Central states having slightly smaller salons (see Figure 3, and Tables 4 and A-3). Most of the establishments had fewer than five work stations, the median size being 3 stations or less. Unisex Salons tended to be the largest of the three, Barber Shops the smallest.

Average Number of Chairs per Salon
July 1991, by Region

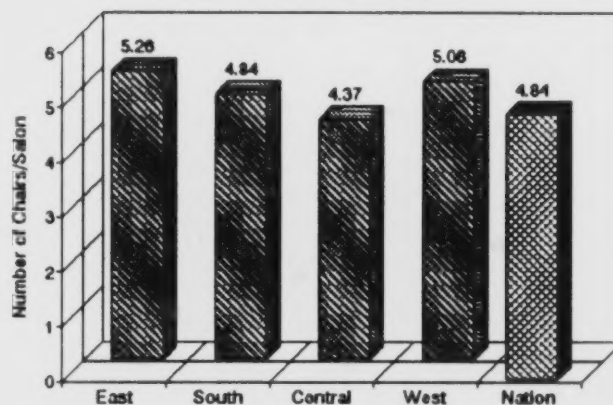


Figure 3

Table 4
Size of Establishment by Region

	Nation	Northeast	South	N. Central	West
1 Chair	16.5%	14.0%	14.5%	24.6%	10.5%
2 Chairs	14.5%	11.0%	15.6%	15.2%	15.0%
3 Chairs	13.6%	14.2%	16.6%	9.3%	12.8%
4 Chairs	11.8%	14.0%	11.3%	9.2%	14.3%
5-9 Chairs	31.3%	31.3%	29.6%	30.4%	37.1%
10+ Chairs	9.4%	12.9%	9.0%	7.8%	8.4%
Average number of chairs/salon	4.84 (±.21)	5.26 (±.51)	4.84 (±.44)	4.37 (±.36)	5.06 (±.41)

Summary

The salon industry is quite large -- 298,164 establishments, mostly Beauty Salons and Unisex Salons. Relatively few establishments are located in the central part of big cities -- the highest percentage of salons are located in rural areas and small cities.

This is a very stable industry -- 87% of the salons have been in business for three years or more. Salons average 4.84 chairs with the salons in the Northeast and West being slightly larger.

Chapter 3

Salon Employment in 1990

Number of Employees

We found that there were 1,264,000 ($\pm 65,000$) professional employees working in the industry at the end of 1990 -- an average of 4.24 ($\pm .22$) employees per salon (see Table A-4) and an average of 5.5 hair professionals per 1,000 inhabitants. In contrast there are 1,182,000 elementary school teachers, 777,000 lawyers, and 486,000 police officers in the United States.

Beauty Salons, Barber Shops and Unisex Salons employed 786,549 ($\pm 53,900$), 84,067 ($\pm 11,300$) and 393,989 ($\pm 33,000$) professionals respectively (see Tables 5, A-4, A-5, and A-6).

Three classes of employment were examined in this study -- full-time employees, part-time employees, and contractors or "booth renters". This latter type of employment consists of those who operate as independent contractors, with their own client bases, and pay a percentage of their gross or a flat rental fee for the work station that they use.

These three types were further divided into experienced employees, with at least one year of experience, and entry-level employees, with less than one year of experience. Salons are typically staffed with experienced, full time employees as opposed to part timers or contractors. Approximately 93 percent were experienced practitioners. Approximately 66 percent of both experienced and inexperienced professionals were full-time (see Table 5 and Figure 4).

Table 5
Number of Professional Employees in December 1990

	Nation	Beauty Salons	Barbers	Unisex Salons
Experienced				
Full Time	759,286	473,734	57,678	227,878
Part Time	257,662	160,358	16,905	80,397
Booth Renters	164,142	94,600	8,019	61,516
Total	1,181,089	728,691	82,602	369,791
Inexperienced				
Full Time	57,674	39,323	867	17,485
Part Time	22,905	16,490	156	6,260
Booth Renters	2,939	2,045	441	454
Total	83,519	57,858	1,465	24,198
Total	1,264,605 (±65,300)	786,549 (±53,900)	84,067 (±11,300)	393,989 (±33,000)

Types of Positions Held
Experienced and Inexperienced Workers

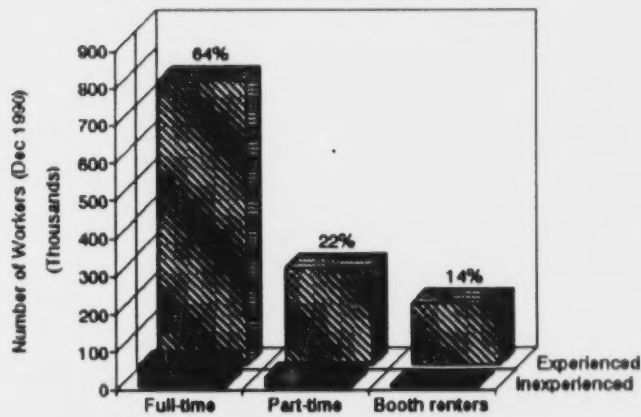


Figure 4

Types of Positions

While there are a number of job classifications or titles employed in salons and shops, the current study concentrated on professional job titles. We were particularly interested in the demand for and supply of graduates of cosmetology schools and, therefore, pinpointed cosmetologists, skin care specialists, electrologists, manicurists, assistant stylists, and barbers. Jobs not requiring advanced training, such as shampooers and receptionists, were excluded.

The vast majority of professionals in the industry are employed as cosmetologists, including stylists, colorists, cutters, and perm specialists. The number of electrologists, skin-care specialists, and assistant stylists working in salons is relatively small (see Figure 5).

Types of Professional Salon Positions
July 1991

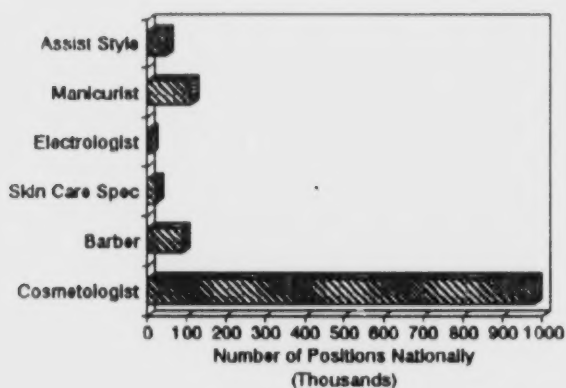


Figure 5

Table A-3 shows the distribution of these job classifications among the types of establishments and the regions of the country. There are no significant differences across the regions in the average number of cosmetologists, barbers, or electrologists per salon. Northeast salons employ significantly more assistant stylists and skin care specialists per

salon. The North Central states employ significantly fewer manicurists, skin care specialists, and assist stylists per salon.

Reviewers of our initial data were surprised by our finding of relatively few manicurists. We were told nail care is a growth industry with a booming number of nail care salons. Table A-16 confirms this growth. Approximately 18% of the Beauty and Unisex Salons were planning on adding manicurists during the second half of 1991. We do not deny the possibility that there is much more demand for manicurists than indicated by our survey. That demand, however, does not appear to be in established Beauty and Unisex Salons with typically only four employees. That demand may be mostly in salons specializing in nail care -- a group not included in our survey.

Job Tenure

In order to gauge job satisfaction, we asked salon owners how long their staffs have been with them. Beauty Salons, Barber Shops, and Unisex Salons owners reported that more than half of their employees have been with them for three or more years. This is consistent with previous studies. The U.S. Department of Labor cited Barbers as being among the 10 professions with the lowest turn-over rate (BLS, 1984, p 10). In comprehensive study of 277 occupations with more than 50,000 workers, Carey (1988) cited Barbers as having the highest median tenure of all professions -- 24.8 years. Over 65% of all Barbers had 20 or more years of work in the profession. Hairdressers and cosmetologists had a median tenure of 8.9 years, slightly less than speech therapists and slightly more than psychologists. The average of all professions was just 6.6 years -- typified by computer system analysts and scientists. If tenure is an indication, the cosmetology industry appears to provide a great deal of job satisfaction (see Table A-8 and Figure 6).

Tenure at the Same Salon

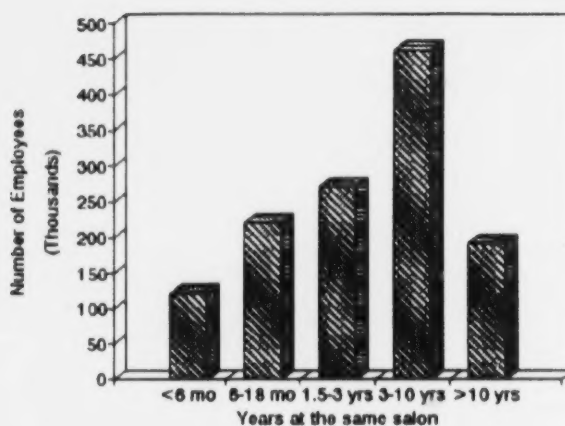


Figure 6

Salaries

Salary information is difficult to obtain, especially for a cash business such as hair care. In order to obtain basic income information, we asked large chains how much their entry-level employees and top stylists received for salaries and commissions.

The chains were quite consistent with regard to starting salaries -- entry-level income ranged from \$11,000 to \$13,200 with an average of \$12,100. There was a great deal of variation in the income of top stylists -- ranging from \$22,400 to \$100,000 with an average of \$45,600. This compares favorably with the average annual pay in the United States -- \$21,871 in 1988.

While the chains represented a sizeable number of professional employees, over 5% of the industry, they are not necessarily representative of the industry. The income received by entry-level and top employees in the smaller, independently owned salons are likely to be different.

Summary

The industry employs approximately 1,265,000 professionals -- a large number by any standard. The number of new entrants is relatively small. At the end of 1990, only 7% of the working cosmetologists had less than 1 year's experience.

The typical salon has 4.24 professional workers. More than half of the employees have been at the same salon for more than three years; one out of four is new to the salon, with less than 1.5 years at that location. Starting salaries appear to be low. The typical entry level pay for large chains is \$12,000. There are, however, significant opportunities for making a good income. The average top pay for a stylist is \$45,000.

Chapter 4

Job Opportunities

Openings

While 52% of professional salon employees stay at the same salon for three or more years (Figure 6), another 26% of the employees working in salons in July 1991 were there for less than one and a half years. Thus, the typical salon has two individuals that have been together for a long time, one that has been there a few years, and one individual that is relatively new. We found that there is significant turn-over for that "relatively-new" slot.

Salon owners were asked "*How many professionals joined your staff in 1990?*" They were instructed to include people that no longer worked for them. If they hired the same person twice, they were to count that as two hires. In addition, respondents indicated whether these job openings were filled by experienced or inexperienced people and whether they joined as full-timers, part-timers, or booth renters.

There were 506,715 ($\pm 45,600$) job openings during 1990, for an average of 1.78 ($\pm .15$) openings per salon and .40 ($\pm .03$) openings per employee. Large chains had a similar turn-over rate.

The greatest proportions of job openings were in the Northeastern and Western states, with 2.30 ($\pm .46$) and 2.20 ($\pm .39$) openings per salon respectively. The North Central states had nearly one fewer opening per salon, 1.32 ($\pm .21$) openings per salon (see Table 6, A-9, and A-10).

These large numbers indicate that there are numerous opportunities for new licensees to obtain jobs in the field -- 5.30 ($\pm .49$) openings per new licensee nationwide (see Table A-11). Tables 6 and A-11 and Figure 7 show the number of entry-level positions by region.

Table 6
Entry-level Job Openings (Openings per New licensee) by Region

	Nation	Northeast	South	North Central	West
Beauty Salons	72,028 (0.75)	18,278 (1.02)	24,600 (0.76)	14,742 (0.69)	14,408 (0.60)
Barber Shops	12,152 (0.13)	7,650 (0.43)	3,356 (0.10)	1,069 (0.05)	78 (0.00)
Unisex Salons	38,623 (0.40)	11,047 (0.61)	8,603 (0.26)	12,353 (0.58)	6,620 (0.28)
Total	122,803 (1.28) (±17,600)	36,975 (2.06) (±10,300)	36,558 (1.13) (±9,000)	28,164 (1.32) (±7,700)	21,106 (0.89) (±7,000)

Number of entry level job openings
during 1990 per new licensee

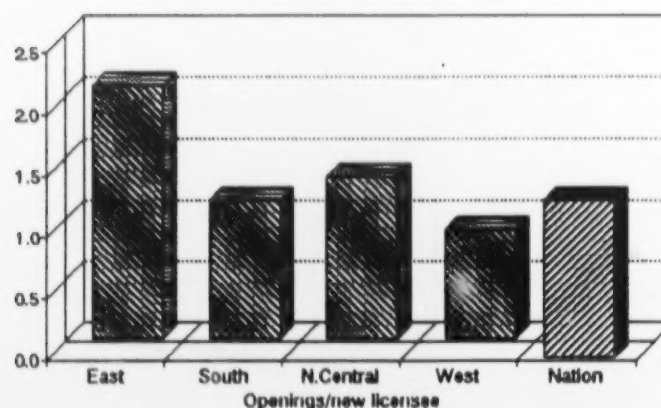


Figure 7

During 1990, there were 122,803 ($\pm 23,300$) entry-level job openings, 1.28 ($\pm .19$) openings for each new licensee. There were more openings than licensees in every region except the West. The greatest proportion of entry-level job opportunities were in the Northeast and in Beauty Salons. There were relatively few entry-level opportunities in Barber Shops (see Tables 6, A-10 and A-11).

New Hires

In Table 1 we indicated the number of new licensees in each of the four regions -- the supply side of the supply and demand equation. A conservative estimate of demand is the number of inexperienced entry-level people that had jobs at the end of the year.

In our survey of salon owners, we asked "*How many professionals worked in your shop in December of 1990?*" Again, salon owners indicated the numbers that were experienced and inexperienced and the numbers that were full-time, part-time and booth renters. In December 1990, there were 83,519 ($\pm 11,500$) professionals with less than one year experience working in salons. Consistent with the demographics of the industry described in Chapters 2 and 3, most of the entry-level employees were working full time, in small city and suburban Beauty Salons (see Figure 8 and Table A-4).

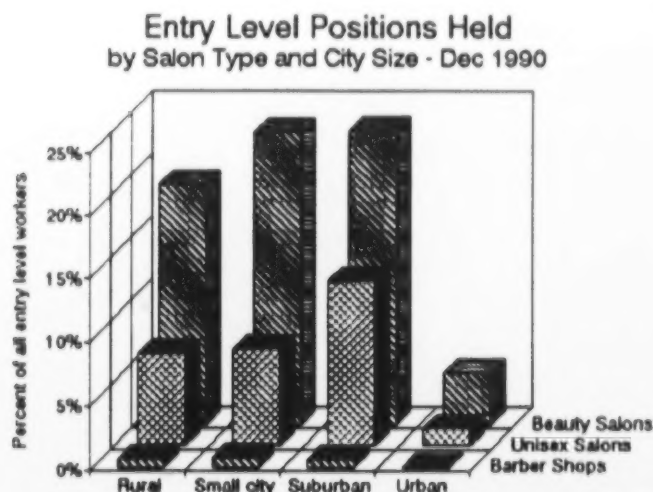


Figure 8

The entry-level employment rate (entry-level workers divided by the number of new licensees) was highest in the Northeastern and Central states (nearly 100%) and lowest in the Western states (70%) (see Table 7 and Table A-11 in conjunction with Table A-4).

Table 7
New Licensees and Entry-level Employment Rates

	Nation	Northeast	South	N. Central	West
N of New Licensees	95,666	18,044	32,483	21,389	23,731
N of Inexper Employees	83,519 (±11,500)	17,498 (±4,500)	28,187 (±8,000)	21,344 (±5,300)	16,493 (±4,800)
Employment rates	87.3%	97.2%	86.8%	99.8%	69.5%
Full time	60.3%	62.1%	50.8%	71.3%	62.5%
Part time	23.9%	34.7%	30.6%	26.3%	4.5%
Booth Renters	3.1%	0.1%	5.4%	2.1%	3.0%

For most parts of the country and as a national average, the employment rates are remarkably high. In the midst of a recession, virtually everyone who obtains a license is able to find employment.

The entry-level employment rate in the West, however, was much less than that of the other regions. In that region, some 23,731 new licensees entered the labor force, and 16,493 (±4,800) were hired. From Table 7, it appears that much of the shortage is due to salons in the West not hiring entry level part-time workers.

While the lower rate may be a sampling artifact, we had noted earlier that relative to the other region, the West was producing many more new licensees per salon, .50 compared to .32 for the rest of the nation. It appears that this high licensure rate is producing a surplus of some 7,000 workers. A more appropriate new licensee rate would be 16,493/47,020 or 35%, a figure comparable to that of the rest of the nation. Since the licensure passing rate is about the same in the West as it is in the rest of the nation (79% versus 76%, based on data in the 1991 *Milady Guide*, page 143), it appears that schools in this region are enrolling too many students. However, the next section of this report indicates that there may be a significant number of potential slots that went unfilled in this region.

Unfilled positions

The number of new hires is a conservative estimate of demand because it is not a complete measure of demand -- it does not include unfilled positions. If demand exceeds supply, then we would expect to find a large number of unfilled positions. To better gauge the potential for the industry we asked salon owners two questions:

- "Were you always able to find qualified professional employees during 1990?",
- "During 1990, did you have enough business to justify hiring more professionals than you did? If so, how many?" Again, they were to indicate experienced, inexperienced, full-time, part-time, booth-renters.

Nearly half of the salons, 48.9%, indicated that they were not always able to find qualified employees. There were no significant regional differences.

There were approximately 204,000 unfilled positions in 1990 -- two slots for every three salons. Approximately 25% of these slots were intended for entry-level workers -- one unfilled position in every four salons. Salons in the Northeast could have used the greatest proportion of inexperienced workers. Salons in the West could have used the greatest proportion of experienced workers and the lowest proportion of inexperienced workers -- one in every eight salons, still a significant amount (see Tables 8, A-1, A-13 and A-14).

Whether these slots were unfilled due to economic fears, recruitment inefficiencies, regional supply and demand differences, capacity limits, or dissatisfaction with the quality of applicants is unknown. Further, these numbers may have been exaggerated by the salon owners. We do not know whether these reported slots are real or they would have been filled had qualified applicants been available. Nevertheless, the reported inability to find qualified applicants, the large number of reported potential jobs, and the large number of

entry-level jobs strongly clearly indicate that the supply of cosmetologists is not keeping up with demand.

Table 8
Additional Justified Positions (average per salon), by Region and Salon Type

	Nation	Northeast	South	North Central	West
Totals	203,995 (0.68)	41,574 (0.70)	79,440 (0.71)	41,499 (0.52)	41,483 (0.88)
Experienced	163,530 (0.55)	29,606 (0.50)	66,697 (0.60)	31,537 (0.39)	35,690 (0.76)
Inexperienced	40,465 (0.14)	11,968 (0.20)	12,743 (0.11)	9,962 (0.12)	5,793 (0.12)
Beauty Salons	119,853 (0.62)	19,471 (0.53)	51,236 (0.64)	21,125 (0.44)	28,021 (1.00)
Experienced	98,341 (0.51)	12,871 (0.35)	41,893 (0.52)	17,873 (0.37)	25,703 (0.92)
Inexperienced	21,512 (0.11)	6,600 (0.18)	9,343 (0.12)	3,251 (0.07)	2,318 (0.08)
Barber Shops	10,846 (0.35)	3,235 (0.61)	2,673 (0.26)	3,498 (0.34)	1,440 (0.29)
Experienced	9,284 (0.30)	3,235 (0.61)	2,104 (0.21)	2,533 (0.25)	1,413 (0.28)
Inexperienced	1,561 (0.05)	0 (0.00)	569 (0.06)	966 (0.09)	26 (0.01)
Unisex Salons	73,296 (0.98)	18,868 (1.12)	25,530 (1.16)	16,876 (0.77)	12,022 (0.86)
Experienced	55,904 (0.75)	13,500 (0.80)	22,700 (1.03)	11,131 (0.51)	8,573 (0.61)
Inexperienced	17,392 (0.23)	5,368 (0.32)	2,830 (0.13)	5,745 (0.26)	3,449 (0.25)

Recruitment Methods

In seeking new employees, salon owners most frequently use personal approaches, such as word-of-mouth, referrals by fellow workers, referrals by schools, and advertisements in local paper. State and national sources, such as state employment agencies and trade journals are used least frequently. Because state employment agencies are rarely used by the industry, employment estimates based on their use would be highly misleading (see Figure 9 and Table A-15).

Sources Used by Salons in Seeking New Professionals

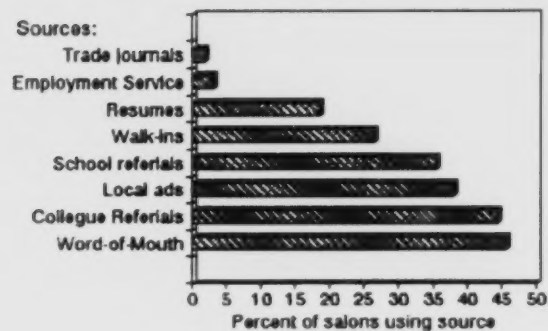


Figure 9

Hiring Plans

While we studiously avoided making tenuous projections of job demand, we did ask salons to indicate whether they had plans to increase the number of professionals in their salon during the second half of 1991. Two out of every five salons (42.6%) indicated they planned to increase the number of cosmetologists. One out of five planned to increase the number of manicurists. Very few salons were planning to increase the number of electrologists (see Table A-16).

Summary

The supply and demand for new licensees is summarized in Figure 10 and Table 9. In December 1990, 83,000 entry-level individuals were working in Beauty Salons, Barber Shops, and Unisex Salons. During that year, approximately 95,000 new licensees were competing for one of 125,000 job openings, and one of 123,000 potential positions.

Virtually every new licensee in the Northeast, North Central and Southern United States was working in the field at the end of the year.

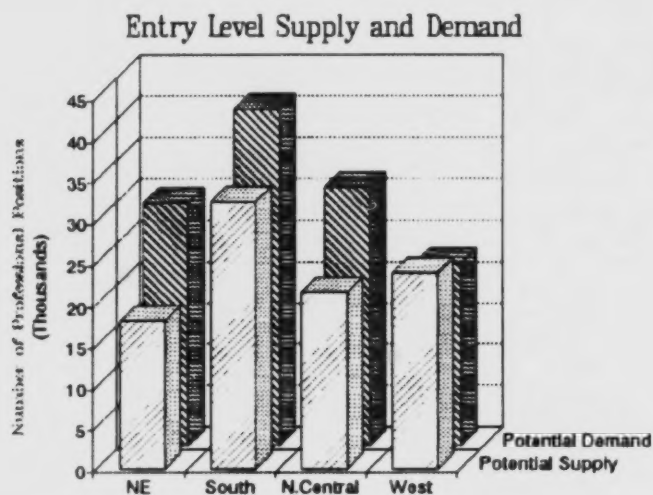


Figure 10

Supply is not keeping up with demand in most of the United States. Nearly half of the salons reported that they were not able to find qualified employees during the year. Potential demand, which is the 83,000 filled entry-level jobs and the 40,000 unfilled entry level positions, greatly exceeds the supply of new licensees in every region of the country except the West.

Table 9
Entry-Level Supply and Demand (Number per salon)

	Nation	Northeast	South	N. Central	West
Demand	123,984 (0.42)	29,466 (0.50)	40,930 (0.36)	31,306 (0.39)	22,286 (0.47)
Filled	83,519 (0.28)	17,498 (0.30)	28,187 (0.25)	21,344 (0.27)	16,493 (0.35)
Unfilled	40,465 (0.14)	11,968 (0.20)	12,743 (0.11)	9,962 (0.12)	5,793 (0.12)
Supply	95,666 (0.32)	18,044 (0.30)	32,483 (0.29)	21,389 (0.27)	23,731 (0.51)
Supply/Demand	77%	61%	79%	68%	106%

Chapter 5

Regional Similarities and Differences

One way analyses of variance and chi-square analyses were conducted to identify significant differences across the regions. Tests were conducted at the $\alpha = .05$ level.

Significant regional differences were not found on the following major questions:

- Distribution of salon types -- Approximately 65% are Beauty Salons, 10% are Barber Shops, and 25% are Unisex Salons.
- Number of chairs, experienced employees and entry-level employees per salon -- 4.89, 3.96 and .28 per salon, respectively.
- Plans to increase the number of cosmetologists -- Approximately 42% plan increases.
- Ability to find qualified employees -- 48.9% stated that they were always able to find qualified employees.

The survey uncovered the following regional differences for 1990:

Northeast

- Oldest average salon age and the highest average employee tenure
- A high hiring rate for full time experienced workers
- Few Booth renters
- The highest number of job openings per salon for part-time entry-level positions
- The highest number of part-time entry-level employees in December
- The highest utilization of Assistant Stylists, Skin Care Specialists, and Manicurists (although these were not high numbers)
- The least use of state employment service agencies and word-of-mouth
- The highest use of local advertisements and school referrals.

South

- More urban salons
- Lowest average salon age and low average employee tenure
- Highest hiring rate for experienced full-time workers
- Low number of job openings per salon for entry-level workers
- Highest number of full-time experienced workers per salon
- Lowest number of part-time experienced workers per salon
- Highest number of unfilled full time experienced positions per salon
- Greatest use of referrals by fellow workers
- Lowest use of local advertisements and walk-ins
- Most anticipated openings per salon
- Highest employment rates for Blacks

North Central

- Higher number of rural salons
- Older salons
- Lowest hiring rate for full-time experienced workers
- Highest number of part-time experienced workers per salon
- Lowest number of full-time experienced workers per salon
- Few booth renters
- Lowest number of manicurists per salon
- Lowest number of assistant stylists per salon
- Least use of referrals by fellow cosmetologists
- High mean years of employment in the same salon
- Lowest proportion of salons planning to increase their number of barbers and manicurists.

West

- Low average salon age
- Highest number of openings/salon
- Highest number of booth renters per salon
- Highest number of manicurists per salon
- Highest proportion of entry-level full-time employees per salon, lowest proportion of entry-level part-time employees per salon

- Low number of Assistant Stylists per salon
- Highest number of unfilled experienced booth renter positions per salon
- High use of employment service
- Highest use of word-of-mouth referrals and walk-ins
- Highest number of recent hires per salon, lowest mean years of employment in the same salon
- Highest number of Asians and Hispanics per salon
- Highest proportion of salons planning to increase their number of barbers, skin care specialists, manicurists, and electrologists
- Lowest use of school referrals.

Chapter 6

Methodology and Other Figures

Methodology

The sampling frame used in this study is defined in Table 1. Extracted from the *1991 Milady Cosmetology State Board Guide* (Yahm, 1991), the table identifies the number of licensed salons by state. Since 1947, the *Guides* have become a definitive source of information concerning the cosmetology industry. It contains detailed state level information concerning licensing and education in the United States and Canada. From the table, it can be seen that over 295,000 organizations in the continental United States.

To verify that the data were current and accurate, we queried representatives from three state licensing boards. A license is required to practice and, due to periodic on-site inspections and hefty renewal fees, salons do not hold onto licenses after closing their practice. Thus, we feel we can place a great deal of confidence in these state lists, especially since it will include the smaller salons.

Sampling followed a one-stage stratified random sampling design with approximately 180 salons from each state randomly selected to participate in the study. Notably excluded from our survey are 1) the cosmetics industry, 2) non-licensed individuals working from their home, and 3) nail care establishments. The cosmetics industry is a major employer of cosmetology program graduates. An informal survey of the cosmetics departments in the Washington DC area revealed that 10-20% of Department store Beauty Advisors are graduates of cosmetology programs. Some states consider cosmetics as a health product and require Beauty Advisors to have a cosmetology license before they apply skin products. The Human Resource Manager for Este Lauder informed us that they work with Department Stores in filling approximately 4,800 positions each year. Thus, we may have omitted a

sizeable portion of demand. We did not consider these Beauty Advisor positions, however, as direct employment in the industry.

Unlike Beauty Advisors, we do consider employment as a manicurist or nail care specialist as direct employment in the industry. We did not, however, include nail care establishments in our survey. Our demand estimates are therefore, biased downward. That is, there is more demand for cosmetology program graduates than we have reported. The extent of that demand is unknown.

We went through a lengthy process to design a short and effective salon owner questionnaire. Interviews with NACCAS staff and ACCRED members helped identify the types of information desired from the survey. A draft questionnaire was developed by Lawrence Rudner and William Deutermann of LMP Associates and edited by Carol Cataldo of NACCAS. Parker Washburn, NACCAS Salon-owner Commissioner, provided extensive input. Rudner, Deutermann and Cataldo then met with Dr. Richard Millard (NACCAS Education Commissioner) and Art DeConcilis (NACCAS School-owner Commissioner) to refine questions. A new questionnaire was then prepared by Rudner and Deutermann and edited by Gayle Schindler of LMP Associates. This draft questionnaire was piloted with ten salon owners and the final questionnaire developed.

To encourage participation in the survey, Robert Mugnai published an editorial in the widely read *American Salon Magazine*, prenotification post cards were sent to the salons selected to be in the study, and a carefully prepared cover letter went with the survey. The editorial emphasized that the survey was needed to gather quality data and that, if they were selected to be in the survey, they had an obligation to the industry to respond. The post card were mailed first class and timed to arrive during the same week as the magazine. It simply notified that they had been selected to be in the survey and that they should see the editorial in *American Salon* for more information, if they haven't done so already. The cover letter and questionnaire arrived 1-2 weeks later, in the first two weeks of July. The cover letter again outlined the importance of the survey. It was signed by the Executive Director of

NACCAS and the editor/publisher of *American Salon*. It was felt that the prestige of these two organizations would also encourage participation.

Responses were received from 1,732 salons for a response rate of 20%. Implausible and out-of-bound values were identified and reconciled; 222 questionnaires were discarded because they arrived too late to be included, 52 were discarded either because they were either too incomplete or contained contradictory data. Four respondents reporting over 50 chairs were also excluded from the analysis. While mega-salons do exist, they are rare. It was felt that these respondents were either reporting data for a chain rather than an individual salon or that they were extreme, atypical cases. Trimming these respondents lowered our employment estimates and increased the accuracy of our estimates.

Sampling weights were computed at the state level and the data aggregated to the regional level. Plausible values for the few missing data points, typically 20 respondents per question, were imputed at the regional level.

Other cosmetology employment figures

One of the constant trade-offs in gathering and reporting occupational statistics concerns precision or accuracy on one hand and information needs on the other. To date, the information needs of the general population and the U.S. Government concerning the cosmetology industry have not been extensive. The only other formal employment figures for cosmetology that we could find were published by the Bureau of Labor Statistics (BLS) as part of their annual *Occupational Projections and Training Data* report.

BLS has been most concerned with (and has excelled in) making cost effective projection concerning *trends* for 1500 occupations. Our study, on the other hand, was concerned with gathering accurate numbers concerning labor force participation for one year in one occupation. BLS used a statistical system with 697 variables to make *projections* on 1,500 occupations. We used a direct employer survey to gather *actual numbers*.

Not surprisingly, we obtained different numbers than BLS. The 1989 edition of the *Occupational Outlook* reports that there were 774,000 jobs with 856,000 jobs expected by the year 2000. Our survey reported higher numbers -- 1,265,000 ($\pm 65,300$) jobs in December 1990.

The BLS approach is statistically elegant and extremely cost effective given the number of professions examined, the main purpose of its projections, and usual uses of its data. The method is known, however, to be weak in making projections of the occupational composition of specific industries (Goldstein, 1980). The models cannot adequately account for mobility among occupations and patterns of withdrawal from, and return to, the labor force in individual occupations. The methods are further restricted due to limited ability to anticipate economic conditions, premature obsolescence, and inadequate base-period data (Rugg, 1983).

Direct employer surveys, such as the one we conducted, do not have these limitations. Direct surveys do not rely upon assumptions concerning the economy or accurately measuring large number of input variables. Labor force participation issues are addressed directly when one asks employers questions concerning the number of employed individuals. Clearly, reasonably competent statisticians would place more faith in our numbers than in the BLS estimates.

Appendix

**Table A-1: Number of Salons (Percent of Region) by Region,
Type of Salon, and City Size, Jan-Dec 1990**

	Nation	Northeast	South	North Central	West
Total	298,164 (100%)	59,005 (100%)	111,997 (100%)	80,142 (100%)	47,020 (100%)
Rural	127,725 (43%)	25,198 (43%)	37,738 (34%)	39,289 (49%)	20,930 (45%)
Small City	84,805 (28%)	18,898 (32%)	30,434 (27%)	21,557 (27%)	13,619 (29%)
Suburban	59,923 (20%)	11,549 (20%)	32,260 (29%)	12,517 (16%)	8,028 (17%)
Central City	25,711 (9%)	3,360 (6%)	11,565 (10%)	6,780 (8%)	4,444 (9%)
Beauty Salons	192,647 (65%)	36,911 (63%)	79,835 (71%)	47,950 (60%)	27,951 (59%)
Rural	91,122 (31%)	16,936 (29%)	30,313 (27%)	25,870 (32%)	14,327 (30%)
Small City	53,883 (18%)	11,508 (20%)	20,709 (18%)	13,017 (16%)	8,147 (17%)
Suburban	33,287 (11%)	6,514 (11%)	20,409 (18%)	5,767 (7%)	3,792 (8%)
Central City	14,355 (5%)	1,954 (3%)	8,404 (8%)	3,296 (4%)	1,685 (4%)
Barber Shops	30,707 (10%)	5,285 (9%)	10,125 (9%)	10,276 (13%)	5,022 (11%)
Rural	11,978 (4%)	2,551 (4%)	2,761 (2%)	4,545 (6%)	1,674 (4%)
Small City	10,453 (4%)	1,640 (3%)	3,989 (4%)	3,162 (4%)	1,860 (4%)
Suburban	5,662 (2%)	911 (2%)	2,148 (2%)	1,779 (2%)	930 (2%)
Central City	2,613 (1%)	182 (0%)	1,227 (1%)	790 (1%)	558 (1%)
Unisex Salons	74,810 (25%)	16,809 (28%)	22,036 (20%)	21,917 (27%)	14,047 (30%)
Rural	24,802 (8%)	5,740 (10%)	4,471 (4%)	8,544 (11%)	4,820 (10%)
Small City	20,568 (7%)	5,740 (10%)	5,749 (5%)	5,386 (7%)	3,718 (8%)
Suburban	20,769 (7%)	4,100 (7%)	9,900 (9%)	5,201 (6%)	3,305 (7%)
Central City	8,671 (3%)	1,230 (2%)	1,916 (2%)	2,786 (3%)	2,203 (5%)

**Table A-2: Number of Salons (Percent of Region)
by Region, Type of Salon, and Salon Age, July 1991**

	Nation	Northeast	South	North Central	West
Total	298,164 (100%)	59,005 (100%)	111,997 (100%)	80,142 (100%)	47,020 (100%)
< 6 months	6,623 (2%)	642 (1%)	3,753 (3%)	515 (1%)	1,687 (4%)
6-18 months	14,497 (5%)	1,867 (3%)	8,941 (8%)	2,671 (3%)	1,004 (2%)
1.5-3 years	15,212 (5%)	2,921 (5%)	4,072 (4%)	4,636 (6%)	3,572 (8%)
3-10 years	94,038 (32%)	18,457 (31%)	37,191 (33%)	21,886 (27%)	16,464 (35%)
11+ years	154,047 (52%)	34,277 (58%)	51,947 (46%)	47,089 (59%)	20,878 (44%)
Beauty Salons	192,647 (65%)	36,911 (63%)	79,835 (71%)	47,950 (60%)	27,951 (59%)
< 6 months	4,910 (2%)	227 (0%)	2,941 (3%)	263 (0%)	1,429 (3%)
6-18 months	12,433 (4%)	900 (2%)	8,097 (7%)	2,570 (3%)	855 (2%)
1.5-3 years	8,589 (3%)	1,403 (2%)	2,037 (2%)	2,191 (3%)	2,902 (6%)
3-10 years	58,704 (20%)	10,953 (19%)	24,845 (22%)	14,949 (19%)	7,972 (17%)
11+ years	99,408 (33%)	23,143 (39%)	37,847 (34%)	26,874 (34%)	11,745 (25%)
Barber Shops	30,707 (10%)	5,285 (9%)	10,125 (9%)	10,276 (13%)	5,022 (11%)
< 6 months	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
6-18 months	733 (0%)	622 (1%)	0 (0%)	61 (0%)	63 (0%)
1.5-3 years	1,730 (1%)	23 (0%)	1,349 (1%)	357 (0%)	0 (0%)
3-10 years	6,392 (2%)	107 (0%)	3,200 (3%)	578 (1%)	2,568 (5%)
11+ years	20,558 (7%)	4,532 (8%)	5,281 (5%)	8,306 (10%)	2,391 (5%)
Unisex Salons	74,810 (25%)	16,809 (28%)	22,036 (20%)	21,917 (27%)	14,047 (30%)
< 6 months	1,712 (1%)	412 (1%)	807 (1%)	253 (0%)	236 (1%)
6-18 months	1,337 (0%)	349 (1%)	846 (1%)	62 (0%)	74 (0%)
1.5-3 years	4,891 (2%)	1,485 (3%)	699 (1%)	2,082 (3%)	630 (1%)
3-10 years	28,925 (10%)	7,364 (12%)	9,124 (8%)	6,436 (8%)	6,016 (13%)
11+ years	34,099 (11%)	6,647 (11%)	8,841 (8%)	11,842 (15%)	6,774 (14%)

**Table A-3: Number of Salons (Percent of Region)
by Region, Salon Type, and Number of Chairs, July 1991**

	Nation	Northeast	South	North Central	West
Total	298,164 (100%)	59,005 (100%)	111,997 (100%)	80,142 (100%)	47,020 (100%)
1 Chair	49,234 (16.5%)	8,284 (14.0%)	16,284 (14.5%)	19,731 (24.6%)	4,935 (10.5%)
2 Chairs	43,167 (14.5%)	6,473 (11.0%)	17,434 (15.6%)	12,197 (15.2%)	7,064 (15.0%)
3 Chairs	40,431 (13.6%)	8,406 (14.2%)	18,553 (16.6%)	7,450 (9.3%)	6,022 (12.8%)
4 Chairs	35,037 (11.8%)	8,289 (14.0%)	12,610 (11.3%)	7,400 (9.2%)	6,738 (14.3%)
5-9 Chairs	93,432 (31.3%)	18,473 (31.3%)	33,113 (29.6%)	24,397 (30.4%)	17,449 (37.1%)
10+ Chairs	28,001 (9.4%)	7,640 (12.9%)	10,122 (9.0%)	6,277 (7.8%)	3,962 (8.4%)
Beauty Salons	192,647 (64.6%)	36,911 (62.6%)	79,835 (71.3%)	47,950 (59.8%)	27,951 (59.4%)
1 Chair	35,103 (11.8%)	7,239 (12.3%)	12,587 (11.2%)	12,569 (15.7%)	2,708 (5.8%)
2 Chairs	29,164 (9.8%)	3,877 (6.6%)	13,662 (12.2%)	8,310 (10.4%)	3,315 (7.1%)
3 Chairs	27,520 (9.2%)	5,343 (9.1%)	15,225 (13.6%)	4,464 (5.6%)	2,488 (5.3%)
4 Chairs	23,496 (7.9%)	4,596 (7.8%)	9,624 (8.6%)	4,211 (5.3%)	5,065 (10.8%)
5-9 Chairs	57,134 (19.2%)	9,878 (16.7%)	22,204 (19.8%)	13,156 (16.4%)	11,896 (25.3%)
10+ Chairs	15,957 (5.4%)	4,709 (8.0%)	5,118 (4.6%)	4,040 (5.0%)	2,089 (4.4%)
Barber Shops	30,707 (10.3%)	5,285 (9.0%)	10,125 (9.0%)	10,276 (12.8%)	5,022 (10.7%)
1 Chair	7,976 (2.7%)	410 (0.7%)	1,712 (1.5%)	4,387 (5.5%)	1,468 (3.1%)
2 Chairs	8,419 (2.8%)	2,130 (3.6%)	1,937 (1.7%)	1,515 (1.9%)	2,838 (6.0%)
3 Chairs	3,786 (1.3%)	542 (0.9%)	1,730 (1.5%)	1,334 (1.7%)	180 (0.4%)
4 Chairs	2,561 (0.9%)	387 (0.7%)	1,039 (0.9%)	833 (1.0%)	301 (0.6%)
5-9 Chairs	7,164 (2.4%)	1,738 (2.9%)	3,495 (3.1%)	1,905 (2.4%)	26 (0.1%)
10+ Chairs	98 (0.0%)	78 (0.1%)	20 (0.0%)	0 (0.0%)	0 (0.0%)
Unisex Salons	74,810 (25.1%)	16,809 (28.5%)	22,036 (19.7%)	21,917 (27.3%)	14,047 (29.9%)
1 Chair	6,155 (2.1%)	635 (1.1%)	1,985 (1.8%)	2,776 (3.5%)	759 (1.6%)
2 Chairs	5,584 (1.9%)	466 (0.8%)	1,835 (1.6%)	2,372 (3.0%)	911 (1.9%)
3 Chairs	9,125 (3.1%)	2,520 (4.3%)	1,598 (1.4%)	1,652 (2.1%)	3,355 (7.1%)
4 Chairs	8,980 (3.0%)	3,306 (5.6%)	1,947 (1.7%)	2,356 (2.9%)	1,371 (2.9%)
5-9 Chairs	29,135 (9.8%)	6,857 (11.6%)	7,413 (6.6%)	9,336 (11.6%)	5,528 (11.8%)
10+ Chairs	11,946 (4.0%)	2,852 (4.8%)	4,984 (4.5%)	2,236 (2.8%)	1,873 (4.0%)

**Table A-4: Number of Professional Employees (Average per salon)
by Region, Type of Salon, and Position, December 1990**

	Nation	Northeast	South	North Central	West
Total	1,264,605 (4.24)	262,640 (4.45)	466,017 (4.16)	319,905 (3.99)	216,042 (4.59)
Exp Full Time	759,286 (2.55)	174,671 (2.96)	274,718 (2.45)	188,268 (2.35)	121,674 (2.59)
Part Time	257,662 (0.86)	64,661 (1.10)	70,762 (0.63)	90,146 (1.12)	32,096 (0.68)
Booth Rent	164,142 (0.55)	5,810 (0.10)	92,350 (0.82)	20,147 (0.25)	45,779 (0.97)
Total	1,181,089 (3.96)	245,142 (4.15)	437,830 (3.91)	298,561 (3.73)	199,549 (4.24)
Inexp Full Tim	57,674 (0.19)	11,214 (0.19)	16,500 (0.15)	15,260 (0.19)	14,704 (0.31)
Part Time	22,905 (0.08)	6,264 (0.11)	9,934 (0.09)	5,635 (0.07)	1,073 (0.02)
Booth Rent	2,939 (0.01)	20 (0.00)	1,754 (0.02)	448 (0.01)	716 (0.02)
Total	83,519 (0.28)	17,498 (0.30)	28,187 (0.25)	21,344 (0.27)	16,493 (0.35)
Beauty Salons	786,549 (4.08)	173,988 (4.71)	300,410 (3.76)	184,960 (3.86)	127,190 (4.55)
Exp Full Time	473,734 (2.46)	119,968 (3.25)	183,878 (2.30)	109,805 (2.29)	60,115 (2.15)
Part Time	160,358 (0.83)	36,489 (0.99)	47,368 (0.59)	53,466 (1.12)	23,064 (0.83)
Booth Rent	94,600 (0.49)	4,111 (0.11)	49,410 (0.62)	10,013 (0.21)	30,992 (1.11)
Total	728,691 (3.78)	160,568 (4.35)	280,657 (3.52)	173,284 (3.61)	114,171 (4.08)
Inexp Full Tim	39,323 (0.20)	8,609 (0.23)	11,663 (0.15)	7,034 (0.15)	12,028 (0.43)
Part Time	16,490 (0.09)	4,811 (0.13)	6,873 (0.09)	4,267 (0.09)	539 (0.02)
Booth Rent	2,045 (0.01)	0 (0.00)	1,216 (0.02)	375 (0.01)	451 (0.02)
Total	57,858 (0.30)	13,420 (0.36)	19,753 (0.25)	11,676 (0.24)	13,019 (0.47)
Barber Shops	84,067 (2.74)	11,720 (2.22)	35,981 (3.55)	25,934 (2.52)	10,432 (2.08)
Exp Full Time	57,678 (1.88)	9,088 (1.72)	22,814 (2.25)	17,523 (1.71)	8,253 (1.64)
Part Time	16,905 (0.55)	2,452 (0.46)	6,917 (0.68)	5,615 (0.55)	1,920 (0.38)
Booth Rent	8,019 (0.26)	0 (0.00)	5,658 (0.56)	2,104 (0.20)	259 (0.05)
Total	82,602 (2.69)	11,540 (2.18)	35,389 (3.50)	25,242 (2.46)	10,432 (2.08)
Inexp Full Tim	867 (0.03)	23 (0.00)	150 (0.01)	692 (0.07)	0 (0.00)
Part Time	156 (0.01)	156 (0.03)	0 (0.00)	0 (0.00)	0 (0.00)
Booth Rent	441 (0.01)	0 (0.00)	442 (0.04)	0 (0.00)	0 (0.00)
Total	1,465 (0.05)	180 (0.03)	592 (0.06)	692 (0.07)	0 (0.00)
Unisex Salons	393,989 (5.27)	76,932 (4.58)	129,625 (5.88)	109,011 (4.97)	78,420 (5.58)
Exp Full Time	227,878 (3.05)	45,631 (2.71)	68,002 (2.09)	60,944 (2.78)	53,299 (3.79)
Part Time	80,397 (1.07)	25,697 (1.53)	16,470 (0.75)	31,068 (1.42)	7,117 (0.51)
Booth Rent	61,516 (0.82)	1,700 (0.10)	37,316 (1.69)	8,025 (0.37)	14,529 (1.03)
Total	369,791 (4.94)	73,028 (4.34)	121,788 (5.53)	100,037 (4.56)	74,945 (5.34)
Inexp Full Tim	17,485 (0.23)	2,585 (0.15)	4,683 (0.21)	7,528 (0.34)	2,677 (0.19)
Part Time	6,260 (0.08)	1,299 (0.08)	3,058 (0.14)	1,371 (0.06)	534 (0.04)
Booth Rent	454 (0.01)	20 (0.00)	96 (0.00)	74 (0.00)	264 (0.02)
Total	24,198 (0.32)	3,904 (0.23)	7,837 (0.36)	8,974 (0.41)	3,475 (0.25)

**Table A-5: Number of Salons (Regional Percent) by Region
Salon Type, and Number of Employees, December 1990**

	Nation	Northeast	South	North Central	West
Total	298,164 (100%)	59,005 (100%)	111,997 (100%)	80,142 (100%)	47,020 (100%)
1 Person	67,364 (23%)	13,546 (23%)	22,171 (20%)	23,627 (29%)	8,019 (17%)
2 People	42,829 (14%)	7,280 (12%)	16,164 (14%)	10,792 (13%)	8,594 (18%)
3 People	40,269 (14%)	8,012 (14%)	17,111 (15%)	8,263 (10%)	6,882 (15%)
4 People	32,615 (11%)	6,291 (11%)	9,548 (9%)	10,931 (14%)	5,845 (12%)
5-9 People	78,901 (26%)	16,118 (27%)	34,698 (31%)	16,936 (21%)	11,150 (24%)
10+ People	23,625 (8%)	4,886 (8%)	6,458 (6%)	6,639 (8%)	5,642 (12%)
Beauty Salons	192,647 (65%)	36,911 (63%)	79,835 (71%)	47,950 (60%)	27,951 (59%)
1 Person	44,397 (15%)	10,459 (18%)	16,051 (14%)	13,544 (17%)	4,343 (9%)
2 People	29,894 (10%)	4,078 (7%)	13,716 (12%)	6,836 (9%)	5,265 (11%)
3 People	25,247 (8%)	4,226 (7%)	12,119 (11%)	5,190 (6%)	3,712 (8%)
4 People	21,084 (7%)	3,906 (7%)	5,956 (5%)	7,694 (10%)	3,528 (8%)
5-9 People	47,927 (16%)	8,969 (15%)	24,287 (22%)	7,910 (10%)	6,761 (14%)
10+ People	14,325 (5%)	3,790 (6%)	2,754 (2%)	4,175 (5%)	3,606 (8%)
Barber Shops	30,707 (10%)	5,285 (9%)	10,125 (9%)	10,276 (13%)	5,022 (11%)
1 Person	10,011 (3%)	1,521 (3%)	1,835 (2%)	4,977 (6%)	1,677 (4%)
2 People	7,417 (2%)	1,931 (3%)	2,229 (2%)	1,420 (2%)	1,837 (4%)
3 People	5,311 (2%)	746 (1%)	2,041 (2%)	1,334 (2%)	1,190 (3%)
4 People	2,382 (1%)	23 (0%)	1,550 (1%)	695 (1%)	113 (0%)
5-9 People	4,132 (1%)	567 (1%)	1,642 (1%)	1,732 (2%)	191 (0%)
10+ People	782 (0%)	78 (0%)	704 (1%)	0 (0%)	0 (0%)
Unisex Salons	74,810 (25%)	16,809 (28%)	22,036 (20%)	21,917 (27%)	14,047 (30%)
1 Person	12,956 (4%)	1,566 (3%)	4,284 (4%)	5,106 (6%)	1,999 (4%)
2 People	5,518 (2%)	1,271 (2%)	219 (0%)	2,536 (3%)	1,492 (3%)
3 People	9,711 (3%)	3,040 (5%)	2,951 (3%)	1,739 (2%)	1,980 (4%)
4 People	9,150 (3%)	2,362 (4%)	2,042 (2%)	2,542 (3%)	2,204 (5%)
5-9 People	26,842 (9%)	6,582 (11%)	8,768 (8%)	7,294 (9%)	4,198 (9%)
10+ People	8,518 (3%)	1,017 (2%)	3,001 (3%)	2,464 (3%)	2,036 (4%)

**Table A-6: Number of Positions (Average per salon) by Region,
Type of Salon, and City Size, Jan-Dec 1990**

	Nation	Northeast	South	North Central	West
Total	1,264,605 (4.24)	262,640 (4.45)	466,017 (4.16)	319,905 (3.99)	216,042 (4.59)
Rural	335,702 (1.13)	72,487 (1.23)	112,221 (1.00)	88,902 (1.11)	62,515 (1.33)
Small City	364,310 (1.22)	67,085 (1.14)	138,146 (1.23)	85,687 (1.07)	73,616 (1.57)
Suburban	446,647 (1.50)	87,815 (1.49)	188,993 (1.69)	102,544 (1.28)	66,539 (1.42)
Urban	117,947 (0.40)	35,253 (0.60)	26,657 (0.24)	42,772 (0.53)	13,371 (0.28)
Beauty Salons	786,549 (4.08)	173,988 (4.71)	300,410 (3.76)	184,960 (3.86)	127,190 (4.55)
Rural	236,572 (1.23)	45,486 (1.23)	91,628 (1.15)	62,637 (1.31)	36,218 (1.30)
Small City	238,934 (1.24)	45,914 (1.24)	84,375 (1.06)	55,156 (1.15)	52,386 (1.87)
Suburban	240,102 (1.25)	57,355 (1.55)	103,588 (1.30)	44,485 (0.93)	34,433 (1.23)
Urban	70,941 (0.37)	25,234 (0.68)	20,819 (0.26)	22,682 (0.47)	4,153 (0.15)
Barber Shops	84,067 (2.74)	11,720 (2.22)	35,981 (3.55)	25,934 (2.52)	10,432 (2.08)
Rural	19,272 (0.63)	4,344 (0.82)	8,171 (0.81)	6,051 (0.59)	704 (0.14)
Small City	28,322 (0.92)	4,054 (0.77)	14,214 (1.40)	5,012 (0.49)	5,059 (1.01)
Suburban	28,188 (0.92)	2,234 (0.42)	12,608 (1.25)	9,616 (0.94)	3,726 (0.74)
Urban	8,285 (0.27)	1,087 (0.21)	988 (0.10)	5,255 (0.51)	943 (0.19)
Unisex Salons	393,989 (5.27)	76,932 (4.58)	129,625 (5.88)	109,011 (4.97)	78,420 (5.58)
Rural	79,985 (1.07)	22,126 (1.32)	9,690 (0.44)	21,551 (0.98)	26,666 (1.90)
Small City	96,384 (1.29)	17,428 (1.04)	39,484 (1.79)	26,207 (1.20)	12,873 (0.92)
Suburban	178,935 (2.39)	28,051 (1.67)	75,906 (3.44)	46,685 (2.13)	29,605 (2.11)
Urban	38,685 (0.52)	9,327 (0.55)	4,544 (0.21)	14,568 (0.66)	9,277 (0.66)

**Table A-7: Number of Professional Employees (Average per salon)
by Region, Type of Salon, and Position, December 1990**

	Nation	Northeast	South	North Central	West
Total	1,264,605 (4.24)	262,640 (4.45)	466,017 (4.16)	319,905 (3.99)	216,042 (4.59)
Cosmetologist	982,138 (3.29)	189,434 (3.21)	367,797 (3.28)	269,061 (3.36)	158,346 (3.37)
Barbers	89,033 (0.30)	12,169 (0.21)	35,772 (0.32)	23,265 (0.29)	18,516 (0.39)
Skin Care Sp	22,838 (0.08)	8,074 (0.14)	7,322 (0.07)	3,171 (0.04)	3,802 (0.08)
Electrologist	9,764 (0.03)	2,441 (0.04)	2,563 (0.02)	2,969 (0.04)	1,767 (0.04)
Manicurists	112,173 (0.38)	27,560 (0.47)	43,750 (0.39)	15,657 (0.20)	24,173 (0.51)
Assist Styli	48,664 (0.16)	22,962 (0.39)	8,813 (0.08)	5,782 (0.07)	9,438 (0.20)
Beauty Salons	786,549 (4.08)	173,988 (4.71)	300,410 (3.76)	184,960 (3.86)	127,190 (4.55)
Cosmetologist	657,812 (3.41)	130,195 (3.53)	254,978 (3.19)	168,009 (3.50)	106,097 (3.80)
Barbers	13,044 (0.07)	1,802 (0.05)	8,075 (0.10)	1,839 (0.04)	1,267 (0.05)
Skin Care Sp	16,578 (0.09)	7,576 (0.21)	6,283 (0.08)	1,656 (0.03)	627 (0.02)
Electrologist	5,589 (0.03)	2,313 (0.06)	1,033 (0.01)	1,464 (0.03)	722 (0.03)
Manicurists	67,644 (0.35)	18,480 (0.50)	25,230 (0.32)	9,062 (0.19)	14,538 (0.52)
Assist Styli	25,884 (0.13)	13,623 (0.37)	4,811 (0.06)	2,931 (0.06)	3,939 (0.14)
Barber Shops	84,067 (2.74)	11,720 (2.22)	35,981 (3.55)	25,934 (2.52)	10,432 (2.08)
Unisex Salons	393,989 (5.27)	76,932 (4.58)	129,625 (5.88)	109,011 (4.97)	78,420 (5.58)
Cosmetologist	288,512 (3.86)	55,188 (3.28)	93,580 (4.25)	89,738 (4.09)	51,246 (3.65)
Barbers	33,257 (0.44)	3,510 (0.21)	12,455 (0.57)	8,073 (0.37)	9,547 (0.68)
Skin Care Sp	6,005 (0.08)	596 (0.04)	946 (0.04)	1,495 (0.07)	2,922 (0.21)
Electrologist	4,044 (0.05)	197 (0.01)	1,502 (0.07)	1,486 (0.07)	986 (0.07)
Manicurists	40,764 (0.54)	8,552 (0.51)	17,877 (0.81)	5,403 (0.25)	8,524 (0.61)
Assist Styli	21,408 (0.29)	8,889 (0.53)	3,264 (0.15)	2,815 (0.13)	5,196 (0.37)

**Table A-8: Number of Professional Employees (Average per salon)
by Region, Type of Salon, and Tenure, December 1990**

	Nation	Northeast	South	North Central	West
Total	1,264,605 (4.24)	262,640 (4.45)	466,017 (4.16)	319,905 (3.99)	216,042 (4.59)
< 6 months	120,935 (0.41)	27,952 (0.47)	41,089 (0.37)	26,672 (0.33)	25,470 (0.54)
6-18 months	220,130 (0.74)	36,168 (0.61)	103,912 (0.93)	42,655 (0.53)	40,110 (0.85)
1.5-3 years	270,911 (0.91)	60,703 (1.03)	92,363 (0.82)	69,729 (0.87)	47,337 (1.01)
3-10 years	462,042 (1.55)	97,018 (1.64)	165,212 (1.48)	123,007 (1.53)	75,958 (1.62)
11+ years	190,590 (0.64)	40,800 (0.69)	63,440 (0.57)	57,842 (0.72)	27,167 (0.58)
Beauty Salons	786,549 (4.08)	173,988 (4.71)	300,410 (3.76)	184,960 (3.86)	127,190 (4.55)
< 6 months	75,370 (0.39)	15,947 (0.43)	29,316 (0.37)	17,321 (0.36)	13,193 (0.47)
6-18 months	152,589 (0.79)	24,393 (0.66)	73,308 (0.92)	27,624 (0.58)	31,626 (1.13)
1.5-3 years	172,977 (0.90)	48,324 (1.31)	57,585 (0.72)	36,930 (0.77)	27,963 (1.00)
3-10 years	261,233 (1.36)	57,048 (1.55)	92,402 (1.16)	69,219 (1.44)	42,043 (1.50)
11+ years	124,380 (0.65)	28,275 (0.77)	47,799 (0.60)	33,866 (0.71)	12,365 (0.44)
Barber Shops	84,067 (2.74)	11,720 (2.22)	35,981 (3.55)	25,934 (2.52)	10,432 (2.08)
< 6 months	9,551 (0.31)	1,135 (0.21)	1,345 (0.13)	1,814 (0.18)	5,277 (1.05)
6-18 months	8,208 (0.27)	814 (0.15)	3,281 (0.32)	4,486 (0.44)	118 (0.02)
1.5-3 years	20,679 (0.67)	827 (0.16)	13,227 (1.31)	3,495 (0.34)	2,440 (0.49)
3-10 years	26,657 (0.87)	4,206 (0.80)	13,980 (1.38)	5,748 (0.56)	1,896 (0.38)
11+ years	18,971 (0.62)	4,738 (0.90)	4,149 (0.41)	10,391 (1.01)	701 (0.14)
Unisex Salons	393,989 (5.27)	76,932 (4.58)	129,625 (5.88)	109,011 (4.97)	78,420 (5.58)
< 6 months	36,422 (0.49)	10,959 (0.65)	10,309 (0.47)	7,410 (0.34)	7,407 (0.53)
6-18 months	58,328 (0.78)	10,764 (0.64)	26,930 (1.22)	11,006 (0.50)	9,515 (0.68)
1.5-3 years	78,165 (1.04)	10,774 (0.64)	22,575 (1.02)	28,362 (1.29)	16,980 (1.21)
3-10 years	171,897 (2.30)	36,058 (2.15)	57,886 (2.63)	46,244 (2.11)	31,200 (2.22)
11+ years	49,177 (0.66)	8,377 (0.50)	11,925 (0.54)	15,988 (0.73)	13,318 (0.95)

**Table A-9: Number of Job Openings (Average per salon) by Region,
Type of Salon, and Position, Jan-Dec 1990**

	Nation	Northeast	South	North Central	West
Total	506,715 (1.70)	135,847 (2.30)	161,510 (1.44)	106,039 (1.32)	103,319 (2.20)
Exp Full Time	260,402 (0.87)	71,704 (1.22)	81,147 (0.72)	54,512 (0.68)	53,038 (1.13)
Part Time	76,616 (0.26)	25,977 (0.44)	19,668 (0.18)	17,344 (0.22)	13,627 (0.29)
Booth Rent	46,894 (0.16)	1,192 (0.02)	24,136 (0.22)	6,019 (0.08)	15,548 (0.33)
Total	383,912 (1.29)	98,873 (1.68)	124,952 (1.12)	77,875 (0.97)	82,214 (1.75)
Inexp Full Tim	89,150 (0.30)	24,288 (0.41)	25,470 (0.23)	21,038 (0.26)	18,354 (0.39)
Part Time	30,085 (0.10)	12,687 (0.22)	9,193 (0.08)	6,367 (0.08)	1,838 (0.04)
Booth Rent	3,568 (0.01)	0 (0.00)	1,895 (0.02)	759 (0.01)	914 (0.02)
Total	122,803 (0.41)	36,975 (0.63)	36,558 (0.33)	28,164 (0.35)	21,106 (0.45)
Beauty Salons	294,263 (1.53)	66,379 (1.80)	107,854 (1.35)	57,922 (1.21)	62,109 (2.22)
Exp Full Time	143,651 (0.75)	33,691 (0.91)	52,778 (0.66)	30,721 (0.64)	26,461 (0.95)
Part Time	46,547 (0.24)	14,290 (0.39)	13,983 (0.18)	9,851 (0.21)	8,422 (0.30)
Booth Rent	32,037 (0.17)	119 (0.00)	16,494 (0.21)	2,607 (0.05)	12,817 (0.46)
Total	222,236 (1.15)	48,101 (1.30)	83,255 (1.04)	43,180 (0.90)	47,700 (1.71)
Inexp Full Tim	47,790 (0.25)	9,684 (0.26)	15,673 (0.20)	9,207 (0.19)	13,226 (0.47)
Part Time	20,909 (0.11)	8,594 (0.23)	7,051 (0.09)	4,776 (0.10)	488 (0.02)
Booth Rent	3,329 (0.02)	0 (0.00)	1,875 (0.02)	759 (0.02)	694 (0.02)
Total	72,028 (0.37)	18,278 (0.50)	24,600 (0.31)	14,742 (0.31)	14,408 (0.52)
Barber Shops	48,216 (1.57)	26,965 (5.10)	8,643 (0.85)	6,150 (0.60)	6,458 (1.29)
Exp Full Time	30,422 (0.99)	18,092 (3.42)	2,813 (0.28)	4,471 (0.44)	5,046 (1.00)
Part Time	4,308 (0.14)	1,223 (0.23)	1,755 (0.17)	75 (0.01)	1,255 (0.25)
Booth Rent	1,333 (0.04)	0 (0.00)	719 (0.07)	535 (0.05)	79 (0.02)
Total	36,063 (1.17)	19,315 (3.65)	5,287 (0.52)	5,081 (0.49)	6,380 (1.27)
Inexp Full Tim	11,808 (0.38)	7,465 (1.41)	3,196 (0.32)	1,069 (0.10)	78 (0.02)
Part Time	325 (0.01)	185 (0.03)	140 (0.01)	0 (0.00)	0 (0.00)
Booth Rent	20 (0.00)	0 (0.00)	20 (0.00)	0 (0.00)	0 (0.00)
Total	12,152 (0.40)	7,650 (1.45)	3,356 (0.33)	1,069 (0.10)	78 (0.02)
Unisex Salons	164,236 (2.20)	42,504 (2.53)	45,013 (2.04)	41,967 (1.91)	34,753 (2.47)
Exp Full Time	86,329 (1.15)	19,921 (1.19)	25,556 (1.16)	19,320 (0.88)	21,531 (1.53)
Part Time	25,761 (0.34)	10,463 (0.62)	3,931 (0.18)	7,418 (0.34)	3,949 (0.28)
Booth Rent	13,524 (0.18)	1,073 (0.06)	6,923 (0.31)	2,877 (0.13)	2,652 (0.19)
Total	125,613 (1.68)	31,457 (1.87)	36,410 (1.65)	29,614 (1.35)	28,133 (2.00)
Inexp Full Tim	29,552 (0.40)	7,139 (0.42)	6,601 (0.30)	10,761 (0.49)	5,050 (0.36)
Part Time	8,852 (0.12)	3,908 (0.23)	2,002 (0.09)	1,591 (0.07)	1,351 (0.10)
Booth Rent	219 (0.00)	0 (0.00)	0 (0.00)	0 (0.00)	219 (0.02)
Total	38,623 (0.52)	11,047 (0.66)	8,603 (0.39)	12,353 (0.56)	6,620 (0.47)

**Table A-10: Number of Job Openings (Average per salon) by Region,
Type of Salon, and City Size, Jan-Dec 1990**

	Nation	Northeast	South	North Central	West
Total	506,715 (1.70)	135,847 (2.30)	161,510 (1.44)	106,039 (1.32)	103,319 (2.20)
Rural	153,403 (0.51)	46,759 (0.79)	46,342 (0.41)	29,507 (0.37)	30,795 (0.65)
Small City	136,600 (0.46)	33,623 (0.57)	32,781 (0.29)	33,243 (0.41)	36,953 (0.79)
Suburban	167,484 (0.56)	38,951 (0.66)	71,753 (0.64)	25,911 (0.32)	30,869 (0.66)
Urban	49,228 (0.17)	16,514 (0.28)	10,634 (0.09)	17,378 (0.22)	4,702 (0.10)
Beauty Salons	294,263 (1.53)	66,379 (1.80)	107,854 (1.35)	57,922 (1.21)	62,109 (2.22)
Rural	90,124 (0.47)	12,446 (0.34)	38,446 (0.48)	21,803 (0.45)	17,429 (0.62)
Small City	79,173 (0.41)	16,416 (0.44)	18,227 (0.23)	17,320 (0.36)	27,209 (0.97)
Suburban	93,265 (0.48)	27,555 (0.75)	41,393 (0.52)	8,093 (0.17)	16,224 (0.58)
Urban	31,702 (0.16)	9,961 (0.27)	9,788 (0.12)	10,706 (0.22)	1,247 (0.04)
Barber Shops	48,216 (1.57)	26,965 (5.10)	8,643 (0.85)	6,150 (0.60)	6,458 (1.29)
Rural	29,297 (0.95)	24,253 (4.59)	4,026 (0.40)	886 (0.09)	132 (0.03)
Small City	9,056 (0.29)	1,161 (0.22)	2,141 (0.21)	1,728 (0.17)	4,027 (0.80)
Suburban	7,853 (0.26)	1,551 (0.29)	1,776 (0.18)	2,228 (0.22)	2,299 (0.46)
Urban	2,009 (0.07)	0 (0.00)	700 (0.07)	1,309 (0.13)	0 (0.00)
Unisex Salons	164,236 (2.20)	42,504 (2.53)	45,013 (2.04)	41,967 (1.91)	34,753 (2.47)
Rural	33,982 (0.45)	10,061 (0.60)	3,870 (0.18)	6,818 (0.31)	13,234 (0.94)
Small City	48,371 (0.65)	16,045 (0.95)	12,413 (0.56)	14,195 (0.65)	5,717 (0.41)
Suburban	66,366 (0.89)	9,845 (0.59)	28,584 (1.30)	15,591 (0.71)	12,347 (0.88)
Urban	15,517 (0.21)	6,553 (0.39)	146 (0.01)	5,363 (0.24)	3,456 (0.25)

**Table A-11: Number of Job Openings (Number per new licensee)
by Region, Type of Salon, and Position, Jan-Dec 1990**

	Nation	Northeast	South	North Central	West
Total	506,715 (5.30)	135,847 (7.56)	161,510 (4.97)	106,039 (4.96)	103,319 (4.34)
Exp Full Time	260,402 (2.72)	71,704 (3.99)	81,147 (2.50)	54,512 (2.55)	53,038 (2.23)
Part Time	76,616 (0.80)	25,977 (1.45)	19,668 (0.61)	17,344 (0.81)	13,627 (0.57)
Booth Rent	46,894 (0.49)	1,192 (0.07)	24,136 (0.74)	6,019 (0.28)	15,548 (0.65)
Total	383,912 (4.01)	98,873 (5.50)	124,952 (3.85)	77,875 (3.64)	82,214 (3.45)
Inexp Full Tim	89,150 (0.93)	24,288 (1.35)	25,470 (0.78)	21,038 (0.98)	18,354 (0.77)
Part Time	30,085 (0.31)	12,687 (0.71)	9,193 (0.28)	6,367 (0.30)	1,838 (0.08)
Booth Rent	3,568 (0.04)	0 (0.00)	1,895 (0.06)	759 (0.04)	914 (0.04)
Total	122,803 (1.28)	36,975 (2.06)	36,558 (1.13)	28,164 (1.32)	21,106 (0.89)
Beauty Salons	294,263 (3.08)	66,379 (3.69)	107,854 (3.32)	57,922 (2.71)	62,109 (2.61)
Exp Full Time	143,651 (1.50)	33,691 (1.87)	52,778 (1.62)	30,721 (1.44)	26,461 (1.11)
Part Time	46,547 (0.49)	14,290 (0.79)	13,983 (0.43)	9,851 (0.46)	8,422 (0.35)
Booth Rent	32,037 (0.33)	119 (0.01)	16,494 (0.51)	2,607 (0.12)	12,817 (0.54)
Total	222,236 (2.32)	48,101 (2.68)	83,255 (2.56)	43,180 (2.02)	47,700 (2.00)
Inexp Full Tim	47,790 (0.50)	9,684 (0.54)	15,673 (0.48)	9,207 (0.43)	13,226 (0.56)
Part Time	20,909 (0.22)	8,594 (0.48)	7,051 (0.22)	4,776 (0.22)	488 (0.02)
Booth Rent	3,329 (0.03)	0 (0.00)	1,875 (0.06)	759 (0.04)	694 (0.03)
Total	72,028 (0.75)	18,278 (1.02)	24,600 (0.76)	14,742 (0.69)	14,408 (0.60)
Barber Shops	48,216 (0.50)	26,965 (1.50)	8,643 (0.27)	6,150 (0.29)	6,458 (0.27)
Exp Full Time	30,422 (0.32)	18,092 (1.01)	2,813 (0.09)	4,471 (0.21)	5,046 (0.21)
Part Time	4,308 (0.05)	1,223 (0.07)	1,755 (0.05)	75 (0.00)	1,255 (0.05)
Booth Rent	1,333 (0.01)	0 (0.00)	719 (0.02)	535 (0.02)	79 (0.00)
Total	36,063 (0.38)	19,315 (1.07)	5,287 (0.16)	5,081 (0.24)	6,380 (0.27)
Inexp Full Tim	11,808 (0.12)	7,465 (0.42)	3,196 (0.10)	1,069 (0.05)	78 (0.00)
Part Time	325 (0.00)	185 (0.01)	140 (0.00)	0 (0.00)	0 (0.00)
Booth Rent	20 (0.00)	0 (0.00)	20 (0.00)	0 (0.00)	0 (0.00)
Total	12,152 (0.13)	7,650 (0.43)	3,356 (0.10)	1,069 (0.05)	78 (0.00)
Unisex Salons	164,236 (1.72)	42,504 (2.36)	45,013 (1.39)	41,967 (1.96)	34,753 (1.46)
Exp Full Time	86,329 (0.90)	19,921 (1.11)	25,556 (0.79)	19,320 (0.90)	21,531 (0.90)
Part Time	25,761 (0.27)	10,463 (0.58)	3,931 (0.12)	7,418 (0.35)	3,949 (0.17)
Booth Rent	13,524 (0.14)	1,073 (0.06)	6,923 (0.21)	2,877 (0.13)	2,652 (0.11)
Total	125,613 (1.31)	31,457 (1.75)	36,410 (1.12)	29,614 (1.38)	28,133 (1.18)
Inexp Full Tim	29,552 (0.31)	7,139 (0.40)	6,601 (0.20)	10,761 (0.50)	5,050 (0.21)
Part Time	8,852 (0.09)	3,908 (0.22)	2,002 (0.06)	1,591 (0.07)	1,351 (0.06)
Booth Rent	219 (0.00)	0 (0.00)	0 (0.00)	0 (0.00)	219 (0.01)
Total	38,623 (0.40)	11,047 (0.61)	8,603 (0.26)	12,353 (0.58)	6,620 (0.28)

**Table A-12: Number of Job Openings (Number per New Licensee) by Region,
Type of Salon, and City Size, Jan-Dec 1990**

	Nation	Northeast	South	North Central	West
Total	506,715 (5.30)	135,847 (7.56)	161,510 (4.97)	106,039 (4.96)	103,319 (4.34)
Rural	153,403 (1.60)	46,759 (2.60)	46,342 (1.43)	29,507 (1.38)	30,795 (1.29)
Small City	136,600 (1.43)	33,623 (1.87)	32,781 (1.01)	33,243 (1.55)	36,953 (1.55)
Suburban	167,484 (1.75)	38,951 (2.17)	71,753 (2.21)	25,911 (1.21)	30,869 (1.30)
Urban	49,228 (0.51)	16,514 (0.92)	10,634 (0.33)	17,378 (0.81)	4,702 (0.20)
Beauty Salons	294,263 (3.08)	66,379 (3.69)	107,854 (3.32)	57,922 (2.71)	62,109 (2.61)
Rural	90,124 (0.94)	12,446 (0.69)	38,446 (1.18)	21,803 (1.02)	17,429 (0.73)
Small City	79,173 (0.83)	16,416 (0.91)	18,227 (0.56)	17,320 (0.81)	27,209 (1.14)
Suburban	93,265 (0.97)	27,555 (1.53)	41,393 (1.27)	8,093 (0.36)	16,224 (0.68)
Urban	31,702 (0.33)	9,961 (0.55)	9,788 (0.30)	10,706 (0.50)	1,247 (0.05)
Barber Shops	48,216 (0.50)	26,965 (1.50)	8,643 (0.27)	6,150 (0.29)	6,458 (0.27)
Rural	29,297 (0.31)	24,253 (1.35)	4,026 (0.12)	886 (0.04)	132 (0.01)
Small City	9,056 (0.09)	1,161 (0.06)	2,141 (0.07)	1,728 (0.08)	4,027 (0.17)
Suburban	7,853 (0.08)	1,551 (0.09)	1,776 (0.05)	2,228 (0.10)	2,299 (0.10)
Urban	2,009 (0.02)	0 (0.00)	700 (0.02)	1,309 (0.06)	0 (0.00)
Unisex Salons	164,236 (1.72)	42,504 (2.36)	45,013 (1.39)	41,967 (1.96)	34,753 (1.46)
Rural	33,982 (0.36)	10,061 (0.56)	3,870 (0.12)	6,818 (0.32)	13,234 (0.56)
Small City	48,371 (0.51)	16,045 (0.89)	12,413 (0.38)	14,195 (0.66)	5,717 (0.24)
Suburban	66,366 (0.69)	9,845 (0.55)	28,584 (0.88)	15,591 (0.73)	12,347 (0.52)
Urban	15,517 (0.16)	6,553 (0.36)	146 (0.00)	5,363 (0.25)	3,456 (0.15)

**Table A-13: Number of unfilled positions (Average per salon) by Region,
Type of Salon, and Position, Dec 1990**

	Nation	Northeast	South	North Central	West
Total	203,995 (0.68)	41,574 (0.70)	79,440 (0.71)	41,499 (0.52)	41,483 (0.88)
Exp Full Time	99,446 (0.33)	15,290 (0.26)	44,722 (0.40)	17,155 (0.21)	22,279 (0.47)
Part Time	47,512 (0.16)	13,462 (0.23)	16,101 (0.14)	10,364 (0.13)	7,585 (0.16)
Booth Rent	16,571 (0.06)	854 (0.01)	5,874 (0.05)	4,018 (0.05)	5,825 (0.12)
Total	163,530 (0.55)	29,606 (0.50)	66,697 (0.60)	31,537 (0.39)	35,690 (0.76)
Inexp Full Tim	20,188 (0.07)	4,206 (0.07)	5,678 (0.05)	7,571 (0.09)	2,732 (0.06)
Part Time	18,305 (0.06)	6,908 (0.12)	6,219 (0.06)	2,391 (0.03)	2,787 (0.06)
Booth Rent	1,973 (0.01)	854 (0.01)	845 (0.01)	0 (0.00)	274 (0.01)
Total	40,465 (0.14)	11,968 (0.20)	12,743 (0.11)	9,962 (0.12)	5,793 (0.12)
Beauty Salons	119,853 (0.62)	19,471 (0.53)	51,236 (0.64)	21,125 (0.44)	28,021 (1.00)
Exp Full Time	60,446 (0.31)	9,197 (0.25)	27,203 (0.34)	8,448 (0.18)	15,597 (0.56)
Part Time	27,266 (0.14)	3,674 (0.10)	11,485 (0.14)	6,420 (0.13)	5,687 (0.20)
Booth Rent	10,629 (0.06)	0 (0.00)	3,205 (0.04)	3,004 (0.06)	4,419 (0.16)
Total	98,341 (0.51)	12,871 (0.35)	41,893 (0.52)	17,873 (0.37)	25,703 (0.92)
Inexp Full Tim	11,995 (0.06)	3,296 (0.09)	4,560 (0.06)	2,325 (0.05)	1,814 (0.06)
Part Time	8,902 (0.05)	3,304 (0.09)	4,391 (0.05)	926 (0.02)	281 (0.01)
Booth Rent	616 (0.00)	0 (0.00)	393 (0.00)	0 (0.00)	223 (0.01)
Total	21,512 (0.11)	6,600 (0.18)	9,343 (0.12)	3,251 (0.07)	2,318 (0.08)
Barber Shops	10,846 (0.35)	3,235 (0.61)	2,673 (0.26)	3,498 (0.34)	1,440 (0.29)
Exp Full Time	6,211 (0.20)	1,973 (0.37)	1,017 (0.10)	1,966 (0.19)	1,255 (0.25)
Part Time	2,367 (0.08)	1,262 (0.24)	941 (0.09)	32 (0.00)	132 (0.03)
Booth Rent	706 (0.02)	0 (0.00)	145 (0.01)	535 (0.05)	26 (0.01)
Total	9,284 (0.30)	3,235 (0.61)	2,104 (0.21)	2,533 (0.25)	1,413 (0.28)
Inexp Full Tim	960 (0.03)	0 (0.00)	0 (0.00)	934 (0.09)	26 (0.01)
Part Time	150 (0.00)	0 (0.00)	118 (0.01)	32 (0.00)	0 (0.00)
Booth Rent	452 (0.01)	0 (0.00)	452 (0.04)	0 (0.00)	0 (0.00)
Total	1,561 (0.05)	0 (0.00)	569 (0.06)	966 (0.09)	26 (0.01)
Unisex Salons	73,296 (0.98)	18,868 (1.12)	25,530 (1.16)	16,876 (0.77)	12,022 (0.86)
Exp Full Time	32,789 (0.44)	4,120 (0.25)	16,502 (0.75)	6,741 (0.31)	5,427 (0.39)
Part Time	17,879 (0.24)	8,525 (0.51)	3,675 (0.17)	3,912 (0.18)	1,766 (0.13)
Booth Rent	5,236 (0.07)	854 (0.05)	2,523 (0.11)	479 (0.02)	1,380 (0.10)
Total	55,904 (0.75)	13,500 (0.80)	22,700 (1.03)	11,131 (0.51)	8,573 (0.61)
Inexp Full Tim	7,233 (0.10)	910 (0.05)	1,119 (0.05)	4,312 (0.20)	892 (0.06)
Part Time	9,254 (0.12)	3,604 (0.21)	1,711 (0.08)	1,433 (0.07)	2,506 (0.18)
Booth Rent	905 (0.01)	854 (0.05)	0 (0.00)	0 (0.00)	51 (0.00)
Total	17,392 (0.23)	5,368 (0.32)	2,830 (0.13)	5,745 (0.26)	3,449 (0.25)

**Table A-14: Number of unfilled positions (Number per new Licensee) by Region,
Type of Salon, and Position, Dec 1990**

	Nation	Northeast	South	North Central	West
Total	203,995 (2.13)	41,574 (2.31)	79,440 (2.45)	41,499 (1.94)	41,483 (1.74)
Exp Full Time	99,446 (1.04)	15,290 (0.85)	44,722 (1.38)	17,155 (0.80)	22,279 (0.94)
Part Time	47,512 (0.50)	13,462 (0.75)	16,101 (0.50)	10,364 (0.48)	7,585 (0.32)
Booth Rent	16,571 (0.17)	854 (0.05)	5,874 (0.18)	4,018 (0.19)	5,825 (0.24)
Total	163,530 (1.71)	29,606 (1.65)	66,697 (2.05)	31,537 (1.47)	35,690 (1.50)
Inexp Full Tim	20,188 (0.21)	4,206 (0.23)	5,678 (0.17)	7,571 (0.35)	2,732 (0.11)
Part Time	18,305 (0.19)	6,908 (0.38)	6,219 (0.19)	2,391 (0.11)	2,787 (0.12)
Booth Rent	1,973 (0.02)	854 (0.05)	845 (0.03)	0 (0.00)	274 (0.01)
Total	40,465 (0.42)	11,968 (0.67)	12,743 (0.39)	9,962 (0.47)	5,793 (0.24)
Beauty Salons	119,853 (1.25)	19,471 (1.08)	51,236 (1.58)	21,125 (0.99)	28,021 (1.18)
Exp Full Time	60,446 (0.63)	9,197 (0.51)	27,203 (0.84)	8,448 (0.39)	15,597 (0.65)
Part Time	27,266 (0.29)	3,674 (0.20)	11,485 (0.35)	6,420 (0.30)	5,687 (0.24)
Booth Rent	10,629 (0.11)	0 (0.00)	3,205 (0.10)	3,004 (0.14)	4,419 (0.19)
Total	98,341 (1.03)	12,871 (0.72)	41,893 (1.29)	17,873 (0.84)	25,703 (1.08)
Inexp Full Tim	11,995 (0.13)	3,296 (0.18)	4,560 (0.14)	2,325 (0.11)	1,814 (0.08)
Part Time	8,902 (0.09)	3,304 (0.18)	4,391 (0.14)	926 (0.04)	281 (0.01)
Booth Rent	616 (0.01)	0 (0.00)	393 (0.01)	0 (0.00)	223 (0.01)
Total	21,512 (0.22)	6,600 (0.37)	9,343 (0.29)	3,251 (0.15)	2,318 (0.10)
Barber Shops	10,846 (0.11)	3,235 (0.18)	2,673 (0.08)	3,498 (0.16)	1,440 (0.06)
Exp Full Time	6,211 (0.06)	1,973 (0.11)	1,017 (0.03)	1,966 (0.09)	1,255 (0.05)
Part Time	2,367 (0.02)	1,262 (0.07)	941 (0.03)	32 (0.00)	132 (0.01)
Booth Rent	706 (0.01)	0 (0.00)	145 (0.00)	535 (0.02)	26 (0.00)
Total	9,284 (0.10)	3,235 (0.18)	2,104 (0.06)	2,533 (0.12)	1,413 (0.06)
Inexp Full Tim	960 (0.01)	0 (0.00)	0 (0.00)	934 (0.04)	26 (0.00)
Part Time	150 (0.00)	0 (0.00)	118 (0.00)	32 (0.00)	0 (0.00)
Booth Rent	452 (0.00)	0 (0.00)	452 (0.01)	0 (0.00)	0 (0.00)
Total	1,561 (0.02)	0 (0.00)	569 (0.02)	966 (0.05)	26 (0.00)
Unisex Salons	73,296 (0.77)	18,868 (1.05)	25,530 (0.79)	16,876 (0.79)	12,022 (0.50)
Exp Full Time	32,789 (0.34)	4,120 (0.23)	16,502 (0.51)	6,741 (0.32)	5,427 (0.23)
Part Time	17,879 (0.19)	8,525 (0.47)	3,675 (0.11)	3,912 (0.18)	1,766 (0.07)
Booth Rent	5,236 (0.05)	854 (0.05)	2,523 (0.08)	479 (0.02)	1,380 (0.06)
Total	55,904 (0.58)	13,500 (0.75)	22,700 (0.70)	11,131 (0.52)	8,573 (0.36)
Inexp Full Tim	7,233 (0.08)	910 (0.05)	1,119 (0.03)	4,312 (0.20)	892 (0.04)
Part Time	9,254 (0.10)	3,604 (0.20)	1,711 (0.05)	1,433 (0.07)	2,506 (0.11)
Booth Rent	905 (0.01)	854 (0.05)	0 (0.00)	0 (0.00)	51 (0.00)
Total	17,392 (0.18)	5,368 (0.30)	2,830 (0.09)	5,745 (0.27)	3,449 (0.14)

**Table A-15: Percent of Salons using different employee seeking strategies
by Region and Type of Salon**

	Nation	Northeast	South	North Central	West
Total					
Fellow workers	44.35%	44.35%	49.37%	33.50%	50.89%
Cosmetology Schools	35.32%	43.80%	31.84%	36.57%	30.83%
Local papers	37.97%	49.01%	32.24%	36.15%	40.85%
Trade journals	1.94%	4.03%	0.97%	1.01%	3.19%
State employ service	3.14%	1.40%	3.26%	2.02%	6.94%
Word of mouth	45.63%	38.17%	43.18%	43.82%	63.89%
Walk-ins	26.40%	27.21%	22.72%	25.62%	35.46%
Resumes on file	18.45%	21.51%	16.85%	18.81%	17.81%
Beauty Salons					
Fellow workers	27.83%	26.49%	35.44%	17.46%	29.08%
Cosmetology Schools	21.97%	26.15%	22.51%	22.02%	15.35%
Local papers	23.22%	27.19%	22.66%	17.84%	28.77%
Trade journals	1.39%	3.44%	0.46%	0.25%	2.96%
State employ service	2.26%	1.40%	1.87%	1.25%	6.02%
Word of mouth	30.35%	22.75%	32.32%	27.04%	40.85%
Walk-ins	17.15%	15.02%	16.31%	16.13%	23.53%
Resumes on file	11.81%	12.21%	11.42%	12.14%	11.66%
Barber Shops					
Fellow workers	2.63%	1.06%	3.65%	1.96%	3.34%
Cosmetology Schools	2.03%	2.61%	0.95%	2.47%	3.14%
Local papers	2.95%	4.19%	3.34%	3.06%	0.29%
Trade journals	0.12%	0.59%	0.00%	0.00%	0.00%
State employ service	0.43%	0.00%	0.93%	0.30%	0.00%
Word of mouth	3.02%	3.85%	2.27%	2.90%	3.95%
Walk-ins	1.58%	2.20%	1.77%	1.27%	0.89%
Resumes on file	1.32%	1.22%	1.67%	1.41%	0.47%
Unisex Salons					
Fellow workers	13.88%	16.80%	10.27%	14.08%	18.47%
Cosmetology Schools	11.32%	15.04%	8.38%	12.08%	12.34%
Local papers	11.79%	17.63%	6.24%	15.26%	11.79%
Trade journals	0.43%	0.00%	0.51%	0.76%	0.22%
State employ service	0.44%	0.00%	0.46%	0.47%	0.91%
Word of mouth	12.26%	11.57%	8.59%	13.88%	19.09%
Walk-ins	7.67%	9.99%	4.64%	8.21%	11.04%
Resumes on file	5.32%	8.08%	3.76%	5.26%	5.68%

**Table A-16: Percent of Salons planning to increase their professional staff
by Region, Type of Salon, and Position, July 1991**

	Nation	Northeast	South	North Central	West
Total					
Cosmetologists	42.62%	40.42%	46.45%	40.08%	40.62%
Barbers	7.84%	8.42%	5.98%	6.72%	13.43%
Skin Care Specialist	5.75%	2.16%	6.30%	3.72%	12.40%
Electrologists	1.18%	0.00%	1.03%	1.10%	3.15%
Manicurists	18.39%	15.85%	20.17%	13.62%	25.49%
Assist Stylists	9.08%	10.76%	8.44%	6.80%	12.38%
Beauty Salons					
Cosmetologists	28.40%	22.54%	35.52%	24.63%	25.22%
Barbers	3.12%	2.58%	2.49%	2.96%	5.60%
Skin Care Specialist	3.56%	1.78%	4.85%	1.53%	6.21%
Electrologists	0.48%	0.00%	0.92%	0.25%	0.41%
Manicurists	13.27%	9.67%	17.01%	8.34%	17.30%
Assist Stylists	5.54%	6.42%	6.13%	3.58%	6.38%
Barber Shops					
Cosmetologists	1.80%	3.12%	1.80%	1.71%	0.28%
Barbers	2.57%	3.58%	1.71%	2.89%	2.78%
Skin Care Specialist	0.66%	0.00%	0.53%	0.30%	2.44%
Manicurists	0.84%	0.73%	0.53%	0.30%	2.67%
Assist Stylists	0.59%	1.05%	0.53%	0.67%	0.00%
Unisex Salons					
Cosmetologists	12.42%	14.76%	9.13%	13.74%	15.12%
Barbers	2.15%	2.26%	1.78%	0.87%	5.04%
Skin Care Specialist	1.52%	0.38%	0.92%	1.89%	3.75%
Electrologists	0.62%	0.00%	0.11%	0.55%	2.74%
Manicurists	4.27%	5.45%	2.63%	4.98%	5.52%
Assist Stylists	2.95%	3.28%	1.77%	2.55%	6.00%

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